# Investing in Public Education: Advancing the Goal of Continuous Improvement in Student Learning and Achievement

*Report of the Education Equality Task Force, 2002*

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**Dr. Mordechai Rozanski**

December 10, 2002

The Honourable Elizabeth Witmer
Minister of Education

Dear Minister,

I am pleased to present the report of the Education Equality Task Force, *Investing in Public Education: Advancing the Goal of Continuous Improvement in Student Learning and Achievement.*

Thank you for giving me an opportunity to serve the people of Ontario by conducting this review of the Province's education funding formula. Thank you also for your support and encouragement throughout the course of my work.

Sincerely,

Mordechai Rozanski

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# Preface

The government announced the Education Equality Task Force in its Speech from the Throne on May 9, 2002. I was appointed to review the province's student-focused funding formula and to make recommendations on ways to improve equity, fairness, certainty, and stability in the funding of Ontario's students and schools.

Since my appointment, I have considered this review an opportunity to affirm and strengthen Ontario's publicly supported education system by advancing its goal – continuous improvement in student learning and achievement. Since the funding formula is one of the instruments for advancing this goal, my report focuses on improving the formula so that it provides school boards and schools with the means to achieve our education objectives.

The journey from my appointment in May to the publication of this report has been a rewarding and enlightening one for me. More than anything, I have been impressed by the intense desire for high-quality public education among all education stakeholders in Ontario's widely varied communities.

I have not made this journey alone. My understanding of public education and its goals has been greatly enhanced by conversations with, and by reading the work of, several important education "thinkers" and "practitioners," including internationally respected researchers and former ministers and deputy ministers of education. I received thoughtful advice on the issues in my mandate from a panel of expert advisers, all of whom have a broad level of expertise acquired through long careers in Ontario's education system, and from a Stakeholder Advisory Committee made up of representatives of Ontario's major education stakeholders. Chapter 1 and Appendices A and B provide more information on these advisers.

I also received hundreds of oral and written submissions on a wide range of education and education funding issues from individuals, school boards, and education and other organizations during roundtable discussions and in public consultations throughout the province.

Since students are, after all, the focus of Ontario's education funding formula and this report, I am grateful that I was able, while conducting public hearings around the province, to visit some of Ontario's schools and to meet students and their teachers and principals.

The views of all of these people were most helpful as I deliberated the issues and wrote my report.

This report could not have been produced without the dedicated assistance of a key group of support staff and consultants:

- The task force's highly efficient project co-ordinator, Norm Forma, quickly assembled a top-notch task force staff, engaged key consultants, arranged a wide-ranging consultation process in a very short period of time, responded quickly to all my needs, and kept me firmly on track.
- Enid Slack, an economic consultant with an impressive track record as a member of an Education Funding Review Panel in British Columbia and of David Crombie's Who Does What Panel for the Ontario government, provided sensitive and practical advice on a wide range of issues.
- Ken Snowdon, who most recently served as Vice-President, Policy and Analysis, at the Council of Ontario Universities and who has years of experience with funding formulas, cost analyses, and research into higher education issues, conducted important research and advised me on many of the issues.
- Pat Tolmie, who has edited many education task force reports, including several for the Education Improvement Commission, offered valuable editorial advice and guidance in the crafting of this report.

I want to thank the following staff of the Ministry of Education: Suzanne Herbert, Deputy Minister; Norbert Hartmann, Assistant Deputy Minister for Special Projects; Judith Wright, Assistant Deputy Minister, Strategic Planning and Programs; and Peter Gooch, Drew Nameth, Allan Doheny, and Wayne Burtnyk of the Elementary/Secondary Business and Finance Division.

Finally, I would like to thank the Honourable Elizabeth Witmer, Minister of Education, for her support and for encouraging me to offer candid advice on ways to improve Ontario's education funding formula.

Mordechai Rozanski
Guelph, Ontario

November 28, 2002

# 1. Task Force Mandate and Process

## Mandate

As I noted in my "Preface," the Education Equality Task Force was announced in the Speech from the Throne on May 9, 2002. The government appointed me to review the province's education funding formula and to make recommendations, to be considered for the 2003–04 school year, on ways to improve equity, fairness, certainty, and stability in the funding of Ontario's students and schools.

I was asked to review six aspects of the funding formula:

1. the effectiveness of the model for distributing funding between different types of boards (for example, between urban and rural boards, between small and large boards)
2. the structure of cost benchmarks (for example, does per pupil funding reflect appropriate per pupil costs?)
3. the degree of local expenditure flexibility school boards should have
4. approaches to addressing school renewal (for example, maintenance, repairs, renovations)
5. whether the current approach to funding special education is the most responsive way to meet students' needs
6. the approach to funding student transportation, including ways to maximize opportunities for shared busing services between school boards that serve the same communities

In addition, I was asked to ensure that my recommendations:

- promote the principles on which the funding mechanism was built, which include fairness, equity, responsiveness to learners' needs, and accountability
- improve the stability of the education system
- respect the legislative and constitutional framework for education in Ontario, which includes public, Catholic, French-language, and English-language school boards
- take into account the fiscal situation of the Province

## Expert Advisers

I was assisted in my work by a five-member team of independent expert advisers: Ann Vanstone, Patrick Slack, Lynn Beyak, Brian Cain, and Mariette Carrier-Fraser. Their biographies appear in Appendix A, as does mine.

Each of these experts possesses broad experience acquired during a career of service in Ontario's education system. Together they have served as a key resource, working directly with me as I met with stakeholders and the public, reviewed research and submissions, and developed my recommendations.

All of the advisers are independent volunteers not currently employed in the education sector.

## Stakeholder Advisory Committee

I was also assisted by a 31-member Stakeholder Advisory Committee. This committee was composed of representatives from major education-related organizations, including those representing parents, students, teachers, principals, trustees, directors of education, and school board supervisory officials. Their names and affiliations can be found in Appendix B.

The role of the Stakeholder Advisory Committee differed from that of the expert advisers. While the expert advisers were acting in an independent capacity, each member of the Stakeholder Advisory Committee brought the perspective of his or her group to the consultation process. The Stakeholder Advisory Committee provided the current perspectives of members of the education community, helped the task force focus on key issues in its discussion paper (see below), and provided advice on the structure of the consultations. In addition, each committee member's organization made a presentation or submitted a brief on the issues under consideration.

## Research and Consultation Process

I began my research and consultation process in late May 2002 with a detailed review of Ontario's education funding formula and past studies and reports related to the formula. These activities continued through the spring and summer.

To encourage a wide range of input from the education community and members of the public, in July 2002 my staff established a website where I posted information about my mandate, objectives, and activities. I also encouraged people to use the website, or the mail, to send me their opinions on the issues in my mandate.

In the summer of 2002, with the assistance of my expert advisers and the members of the Stakeholder Advisory Committee, I developed a discussion paper and posted it on the task force website. The paper, which was designed to frame the research and consultation process, posed questions about the role of the funding formula in advancing five principles: the quality of student learning and achievement, equity and fairness, responsiveness to local needs, accountability, and affordability. While the paper focused on these five principles, I encouraged readers to consider *all* aspects of the formula open to discussion. (Appendix C contains an excerpt from the discussion paper, covering the main points.)

My research covered a wide range of issues, focusing on education funding but also looking at studies on education itself, education systems, and the effect of various influences on children's ability to learn and to succeed in school. I wanted my recommendations to be based not only on what I heard during my consultations, but also on empirical studies and evidence-based research.

My staff and I reviewed education funding concepts and systems across Canada and in the United States, the United Kingdom, and New Zealand to see how they handled the various issues involved. I also benefited greatly from the research services of the Ministry of Education's Strategic Planning and Elementary/Secondary Programs Division and the data gathering and modelling capabilities of the ministry's Elementary/Secondary Business and Finance Division. Staff of these divisions responded to my questions and provided data promptly and thoroughly.

I consulted some of the most eminent thinkers in education in Canada:

- Dave Cooke, former Minister of Education and Training in Ontario; former Co-Chair of the Education Improvement Commission and the Task Force on Effective Schools
- Dr. Michael Fullan, Dean of the Ontario Institute for Studies in Education/University of Toronto; researcher, consultant, and policy adviser to education organizations and government agencies in Canada, Britain, and elsewhere
- Veronica Lacey, President and Chief Executive Officer of The Learning Partnership; former Deputy Minister of Education and Training in Ontario; former Director of Education and Secretary-Treasurer of the North York Board of Education
- Dr. Dan Lang, Professor, Higher Education Management and Finance, Department of Theory and Policy Studies, Ontario Institute for Studies in Education/University of Toronto
- Dr. Fraser Mustard, Founding President and Fellow, The Canadian Institute for Advanced Research; a leading researcher in the socio-economic determinants of human development and health, with a particular emphasis on early childhood
- Dr. Charles E. Pascal, Executive Director of the Atkinson Foundation; former Deputy Minister of Education and Training and of Community and Social Services, both in Ontario
- Dr. Charles Ungerleider, Professor, Sociology of Education, Department of Educational Studies, University of British Columbia; former Deputy Minister of Education in British Columbia

I also read both published work and pre-publication manuscripts by these people, as well as the writings of other highly respected researchers in the fields of education such as Michael Barber, Richard Elmore, and Peter Hill. (See also the "Select Bibliography" at the end of this report.)

My public consultation process, which was extensive, was designed to be as inclusive as possible. In August 2002, I held a series of 12 roundtable discussions with 179 invited participants. The participants, who had been recommended to me by members of the Stakeholders Advisory Committee and others, were grouped as follows: parents, students, trustees, administrators, principals, teachers, taxpayers, francophone educators and community members, people from both urban and rural boards, school board support staff, and special education staff. My expert advisers and I spent one day with each group.

In September 2002, I hosted 10 days of public meetings in the following cities: Ottawa, Thunder Bay, Toronto, North Bay, London, and Barrie. These hearings were advertised extensively in the media. They were scheduled from 9 a.m. to 9 p.m. to accommodate as many participants as possible, particularly those working during the day. A total of 575 people, representing organizations or appearing as individuals, made presentations at these hearings.

To improve my understanding of Ontario's schools, I took advantage of the public meetings to visit schools in each of the cities where hearings took place. I visited English- and French-language, public and Catholic, and elementary and secondary schools.

In early October 2002, I held a series of brief but informative meetings with representatives of the major education stakeholder groups in the province and the Chiefs of Ontario. I also met, at their request, with members of the caucuses of the Progressive Conservative Party, the Liberal Party, and the New Democratic Party.

In all, I met with or heard presentations from more than 900 people and the task force received 882 formal submissions. All of these submissions were reviewed and given careful consideration as I formulated my recommendations.

# 2. Education Funding in Ontario

## Background

The present system of funding elementary and secondary education in Ontario was introduced in 1998, as part of a series of reforms the government began making to Ontario's education system in 1995. Among the changes were the following:

- the introduction of province-wide assessments of student achievement, conducted by the Education Quality and Accountability Office
- the establishment of the College of Teachers
- the introduction of a new elementary and secondary curriculum
- a plan for the gradual phasing out of the Ontario Academic Credit (Grade 13), to be completed in 2003
- a new school board governance structure
- the introduction of mandatory school councils

The new school board structure involved a significant amalgamation of English-language school boards and the establishment of French-language school boards across the province. There are now 72 district school boards in Ontario: 31 English-language public boards, 29 English-language Catholic boards, 4 French-language public boards, and 8 French-language Catholic boards. One of the stated goals of the new structure was the reduction of the administrative costs associated with school board operations.

The new education funding formula replaced a complex system of financing education that had involved a combination of government grants and revenue raised by school boards from their local property tax bases. Before 1998, school boards would set local education property tax rates, and municipalities would collect the taxes on boards' behalf. This system was considered inequitable, since boards with large property tax bases were able to raise more money than boards with access to small tax bases. Boards no longer have the authority to determine education tax rates.

Under the present system, the government sets a uniform rate, based on a current-value assessment system, for the education portion of property taxes for all residential properties in the province. It sets a rate that varies by municipality for the education portion of business property taxes. Municipalities collect the education portion of property taxes for the school boards in their communities. The Ministry of Education, using the student-focused funding formula, determines each board's overall allocation. Property tax revenues are considered to form part of the allocation, and the Province provides additional funding up to the level set by the funding formula.[1]

As I discuss later in this report, the vast majority of those I heard from oppose a restoration of boards' authority to levy taxes. I oppose such a restoration as well, on the grounds of equity.

The new funding formula also streamlined the grants system, reducing the number of grants in the formula by about two thirds.

Called "student-focused funding," the new method of financing elementary and secondary education was intended to accomplish the following:[2]

- provide a fair and equitable level of funding for all students, wherever they live in Ontario
- provide more funding for students in the classroom and less for administration and other non-classroom costs
- provide funding to maintain existing schools and to build new schools where they are needed
- protect funding for special education
- increase the accountability of school boards by ensuring that boards report consistently on how they spend their funding allocations

The government considers student-focused funding to be a fair approach because it uses the same set of rules to allocate funds to all boards and because it recognizes that different boards have different needs and responds to these differences.

Student-focused funding allows school boards a certain amount of flexibility in how they use their allocation to meet local priorities. Only four limits have been set on this flexibility, as follows:

- Funding intended for education in the "classroom" (that is, for the components of a classroom education set out in the Foundation Grant, which is discussed below) must be used in the classroom. It cannot be used, for example, to meet administrative costs.
- Funding intended for special education must be used only for special education.
- Funding intended for new schools or additions and for major repairs to schools must be used only for those purposes.
- Boards must not spend more on administration and governance costs than is provided for in their allocations.

Since the introduction of student-focused funding, the government has made several changes to the formula and added some new money to it.[3]

Although there is general support for the concept and the structure of the student-focused funding formula (I encountered this support during my consultations), school boards and other members of the education community have continued to express concern about whether the funding formula is meeting the government's stated objectives for it. In response to these concerns, the government established this task force.

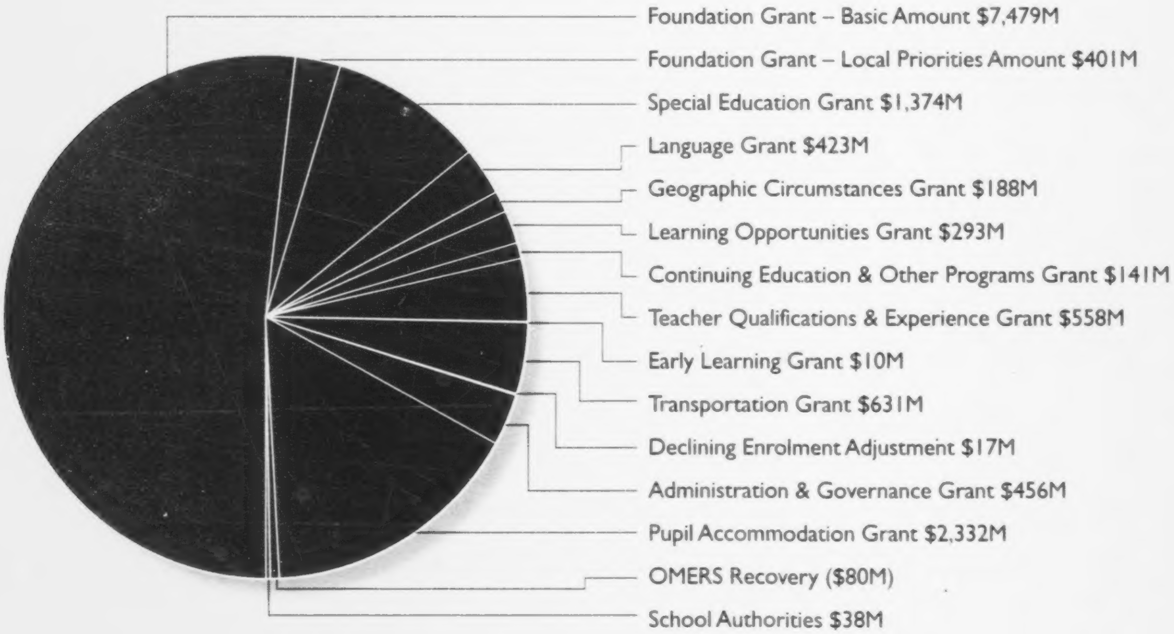
## Student-Focused Funding: The Current Formula[4]

### Overview of the Funding Formula

The student-focused funding formula consists of a Foundation Grant, a series of 10 Special Purpose Grants, and a Pupil Accommodation Grant. For 2002–03, grants to all school boards are projected to total $14.26 billion. This figure includes the Ministry of Education's original projection of $14.215 billion and $45 million added by the ministry in-year. The breakdown of current-year funding among grants is depicted below.

**Student-Focused Funding Formula, 2002–03**

Total allocation: $14.26 billion



*Source:* Appendix I, Table I.1.

The Foundation Grant is intended to cover the components of a classroom education that are required by, and common to, all students. It allocates the same amount per student to all school boards. The Foundation Grant consists of the following major components:

- Basic Amount
- Local Priorities Amount

While boards have the flexibility to determine how they wish to spend the Local Priorities Amount, one of the specific aspects of the funding formula that I was asked to review is the degree of overall expenditure flexibility school boards should have.

The Special Purpose Grants provide school boards with funding to meet additional student needs not covered by the Foundation Grant, which may vary from one student to another, and additional board costs, which may vary from one board to another. The Special Purpose Grants are as follows:

- Special Education Grant
- Language Grant
- Geographic Circumstances Grant
- Learning Opportunities Grant
- Continuing Education and Other Programs Grant
- Teacher Qualifications and Experience Grant
- Early Learning Grant
- Transportation Grant
- Declining Enrolment Adjustment
- Administration and Governance Grant

I was specifically asked to inquire into two areas of the funding formula covered by Special Purpose Grants: the current approach to funding special education and the approach to funding student transportation. I note that the funding mechanisms behind the Intensive Support Amount portion of the Special Education Grant and the Transportation Grant are both also under review by the Ministry of Education.

The Pupil Accommodation Grant is intended to help school boards meet the costs of operating and maintaining their schools and, where warranted, provide new classroom accommodation. The grant has four main components:

- School Operations
- School Renewal
- New Pupil Places
- Prior Capital Commitments

Another specific area that I was asked to review is the funding formula's approach to addressing school renewal (for example, repairs and renovations).

Each of the above grants and their components are described in detail in Appendix D.

The Ministry of Education has established cost "benchmarks" for components of the grants. Benchmarks have two parts, and in this report I refer to them as follows: *benchmark factors* (those items or activities that trigger costs) and *benchmark costs* (the dollar amount assigned to each factor). An example of a benchmark *factor* is 2.75 principals per 1,000 elementary students (which works out to one principal for 364 elementary students); the associated benchmark *cost* for this factor is the salary-and-benefits cost of one principal. Benchmark factors take into account legislated standards, such as the maximum average number of students in a classroom. Benchmark costs are intended to represent a standard or average cost for a particular factor. Benchmarks form part of the formulas the ministry uses to calculate grants, and they therefore affect the amount of funding each board receives.

As part of my mandate, I was specifically asked to examine the structure and appropriateness of the benchmarks.

# 3. Context for Considering the Issues and Making Recommendations

Since my appointment, I have considered this review an opportunity to affirm and strengthen Ontario's publicly supported education system. As the title of this report implies, I view the funding formula as an instrument for advancing the education goal of continuous improvement in student learning and achievement. It provides a context and acts as a prerequisite for achieving this goal.

This report does not attempt to reform the education system; it aims at improving the funding formula – getting it right so that we in Ontario can continue to reform our education system, setting ever higher standards and reaching ever higher levels of achievement. Education reform is still in its early stages in Ontario. At the very least, I hope that my recommendations will provide a funding basis for moving the reform process forward.

When considering Ontario's education system, the funding formula, and my recommendations, I took the following points as "givens":

- Education advances the well-being of individuals in society and of society as a whole. It expands the opportunities available to individuals, enables people to fulfil their potential, underlies economic success, and enhances social cohesion. For those reasons, in democratic societies universal access to education is a common value and public education is seen as a fundamental responsibility of the state.
- For reasons related to the Canadian Constitution, Ontario has four publicly funded education systems: English-language public, English-language Roman Catholic, French-language public, and French-language Roman Catholic.
- Adequate funding of public education is a high societal priority. However, the amount of funding the public is called on to invest in education cannot be considered limitless.
- The goal of Ontario's publicly funded education system, as evidenced by the expectations set out in the Ontario Curriculum and the process established for the province-wide assessment of students, is the continuous improvement of student learning and achievement.
- The education funding formula is a tool for advancing these goals.

## Roles and Responsibilities in Ontario's Education System

One of the first things that a review of the funding formula must take into account is the roles and responsibilities of the various "players" in this system. Based on my examination of these roles and responsibilities and what I learned during my research and consultation process, I developed the following view of the changing structure of, and relationships in, Ontario's education system.

(This view implicitly relates to governance issues, which deserve further study and elaboration. I discuss governance later in this report.)

Many of the points mentioned below are not new. I am particularly indebted to the work in recent years of the Education Improvement Commission and the Task Force on Effective Schools, as well as the writings and thoughts of Michael Barber, Michael Fullan, Charles Ungerleider, and others working in the field of education research.[5]

## The Province

- The Province is responsible for providing its citizens with access to a high quality of public education.
- Through the Ministry of Education, the Province establishes the goals, policies, standards, and performance expectations of Ontario's education system.
- Through the Ministry of Education, the Province establishes the structures and the funding to support its education goals, policies, standards, and expectations.
- The Province holds those who deliver education programs and services accountable for spending education funding effectively to meet the system's goals, policies, standards, and expectations.
- The Province is responsible to the people of Ontario for ensuring that the goals, policies, standards, and expectations it sets are appropriately high, and that the structures and funding it provides for education are appropriate and adequate for meeting those goals, policies, standards, and expectations.

These roles and responsibilities have certain implications for the funding formula. The Province is a policymaker and, therefore, in my view it cannot be, and should not try to be, a micromanager. It should not prescribe all details of programs, services, and administration but should devolve and delegate implementation functions to school boards and school leaders. At the same time, as a policymaker and as the provider of funds, the Province has the right and obligation to demand both fiscal and performance accountability from those who spend the funds provided for public education.

## School Boards (Elected Trustees)

- Boards, in consultation with their administrators and their school communities (principals, teachers, support staff, and school councils), set local policies, priorities, and budgets within the framework of provincial legislation and policy.
- Boards establish their local budgets within the scope provided by their funding allocation. They are responsible for ensuring that their schools and staff have the professional capacity and the appropriate resources to meet provincial and board policies and priorities. They are equally responsible for spending the public funds they receive from the Province in a cost-effective and appropriate way.

- Boards hold their directors of education and, through their directors, their superintendents, principals, teachers, and support staff accountable for meeting provincial and board policies and for ensuring that the board's funding allocation is spent in keeping with the board's budget.
- Boards are accountable to their communities (their electors) and to the Province for continuous improvement in the level of student achievement in their schools.

One implication of the boards' roles and responsibilities is that the funding formula must be flexible enough to allow the boards to meet local needs and priorities. Another is that boards should be required to justify their policies, priorities, and budget and publicly account for their spending and for the level of student achievement in their schools in clear and transparent ways – that is, in ways that the Province and their constituencies, particularly their school councils and parents, can understand.

### The School

- The central role of the school is to advance the goal of continuous improvement in student learning and achievement. At the very least, schools are responsible for the following:
  - developing annual plans to improve student learning and achievement
  - teaching students
  - assessing and reporting on the progress of students, and demonstrating continuous improvement in the level of student achievement
  - working with their boards to attract and retain the best teachers
  - enhancing the motivation and professional skills of teachers
  - working with their school councils to engage parents and community members as partners in planning for continuous improvement and in school life in general
  - providing students with an environment that nurtures the values of the school community
- Schools often also play the following roles:
  - a delivery centre for programs and services that complement education programs and services (for example, school readiness programs, health and social services for children and youth)
  - a community hub – a gathering place for community groups and a centre for community activities
- The school principal is the educational leader, directly responsible for setting school policy and, most important, for continuously improving the quality of teaching and the level of learning and achievement in the school.
- Teachers, under the authority, leadership, and guidance of the principal, are partners in setting and implementing goals and are responsible for the instruction and assessment of students.

The roles and responsibilities of the school are fundamental and profound. In my view, education, while centred in the classroom, is influenced by what occurs in the whole school. Schools and the principals, teachers, and support staff who are at the core of our education system must receive sufficient resources, including the resources needed to build capacity through professional development, to do their job. At the same time, they have an obligation to spend all resources in a cost-effective and appropriate manner and to demonstrate that their expenditures are leading to continuous improvement in student learning and achievement.

The school-community partnership is extremely important. School councils are a vital link between the school and the parents and community it serves. As I noted above, schools must work with their school councils to engage parents and other community members in planning improvement. Research studies repeatedly show that children whose parents are involved in their education do better at school. In addition to helping plan improvement, parents and community members can participate in the school in many helpful ways – as volunteers, by attending parent/community meetings, and simply by staying informed about their children's school life.

The school-community partnership is evident in other ways. Many community services can be delivered through the school – preparing young children and their parents for school, providing literacy and language instruction, providing day care services, acting as a delivery centre for cultural events. As well, when community groups, parents, and others visit the school to participate in community activities and use the school's facilities, they develop a sense of interest and ownership in local education. More public interest in and ownership of educational issues can only strengthen our education system.

The Ministry of Education and the education funding formula have roles to play in facilitating a strong school-community relationship. However, other provincial ministries, other levels of government (federal and municipal), and community agencies should also participate and make reasonable and appropriate contributions related to their areas of responsibility. They should work together with the Ministry of Education to co-ordinate the delivery through the school of educational and non-educational programs and services and also the funding of these activities. These activities and the funding for them should not all be the primary responsibility of the Ministry of Education. (I discuss the integration of these services in more detail later in this report.)

## Guiding Principles for the Funding Formula

As I noted earlier in this report, during my consultation process I provided participants with a discussion paper that raised questions about the effectiveness of the funding formula in advancing five principles: the quality of student learning and achievement, equity and fairness, responsiveness to local needs, accountability, and affordability. These principles guided the consultation and research process I undertook. By the end of the process, however, I had refined my understanding of the goals and structure of Ontario's education system, based on everything I had heard and read. As a result, I also refined and expanded my list of principles.

I believe that the process for funding public education in Ontario should be guided by the following interrelated and interdependent principles:

- adequacy
- affordability
- equity
- stability
- flexibility
- accountability

**Adequacy.** The goals of high program quality, high levels of student achievement, and continuous improvement in both will not be met, in my opinion, without a concomitantly high level of public investment.[6] The reforms enacted in Ontario's education system over the past five years present a challenge to everyone involved in the system. From what I heard, this challenge is welcomed by most members of the public and the education community. But a strong challenge requires strong support. If the system is truly to improve, it must have the capacity to change. While financial support is not the only kind of support needed, it is important that it be adequate to the objectives school boards, teachers, and students are being asked to achieve.

Adequacy is inextricably linked to both affordability and accountability.

**Affordability.** The obverse of adequacy in public funding is affordability. I tend to agree with those who say we cannot afford not to provide adequate funding to meet our goals for public education. Our children deserve no less; our economic future requires no less. But education is only one public priority, and taxpayers' pockets are not bottomless. Parents and everyone in the education system must appreciate the connection between spending on public priorities and the fiscal resources available to the Province.

At the same time, taxpayers are entitled to demand the optimum benefit[7] from any given public expenditure. If public funding for education is not spent wisely, if it is not accounted for transparently, and if its spending does not move us towards our goal of continuous improvement, the public will not be willing to provide it.

Both adequacy and affordability require that the Province and the education community engage in a continuous dialogue and a continuous process of assessing need, determining the appropriate level of funding to meet that need, then assessing results, including levels of student achievement, and reassessing need and the appropriate level of funding. To enhance affordability, the education funding system should actively encourage cost-effectiveness. The continuous process just described should include regular reviews to ensure that the processes and expenditures once thought to be cost-effective are still the most effective way of achieving the maximum benefit.

**Equity.** Equity means fairness. All Ontario students deserve equitable access to education and to the financial resources necessary for a high-quality education. Equity is not equality. Equality is not always equitable. One size does not fit all. Some children, because of socio-economic or geographic circumstances, language issues, and a host of other factors, start school at a disadvantage. Fairness demands that they receive extra support so that they quickly become ready to learn. The structure of the present funding formula recognizes this principle by providing Special Purpose Grants, which are open to all but which are not allocated to all.

Equity may mean, for example, helping children who are not skilled in the language of instruction to master it so that they are not left behind; providing socially disadvantaged children with the interventions they need to become ready to learn; providing children who live in rural or remote areas and children with special needs with the transportation and other services that they need to attend school and school events; and recognizing that French-language boards face higher costs than English-language boards in many aspects of the provision of education programs and services.

The funding system should support every reasonable effort to remove or, if removal is not possible, to mitigate conditions that impede a student's reasonable chance of success in school. It should support every reasonable effort to reduce the gap between low and high achievers without lowering standards or the expectations for student achievement. At the same time, the eligibility criteria for additional support must be transparently clear. Finally, as I noted earlier, it is unfair to require the Ministry of Education alone to provide all the funding necessary for all the additional supports. Many issues related to a child's ability to learn and to succeed in school need to be addressed before the child starts school. Other ministries, other levels of government, and community agencies must share the responsibility for ensuring that students have an equitable opportunity to succeed in school, although, as also suggested earlier, these services could be delivered through the school.

As my examples two paragraphs above imply, equity issues apply to school boards as well as individual students. I discuss this aspect of equity in more detail below, under the related principle of flexibility.

**Stability.** To plan for continuous improvement, boards and schools need to be able to count on a stable and predictable education funding system. Stability and its absence both have implications for the morale, and therefore the commitment to excellence, of administrators, teachers, and support staff. When boards and schools are issued a new or an expanded mandate, they need assurances that they will also be given time to build the capacity to implement the change and resources that are adequate to meet the new demands.

To ensure that improvements are sustainable, boards and schools need a measure of predictability in funding. Both the Province and school boards would benefit from multi-year planning of education funding. A multi-year model would provide an element of predictability and time to plan ahead for both partners, with the caveat, of course, that the Province's economic situation could change and that the multi-year process would have to be fluid and dynamic enough to recognize and adapt the model to such a change.

**Flexibility.** This principle is related to equity. Ontario is a vast and diverse province, and the needs of students in one board's jurisdiction are not necessarily the needs of those in another board. The funding system should be both flexible and adaptable to allow boards and their schools a certain amount of discretion in assessing their local needs and spending part of their funding allocation to address those local needs. It should also encourage and celebrate the development of innovative, cost-effective programs and strategies.

Flexibility in accommodating local needs cannot exist without transparent accountability, which I discuss below.

**Accountability.** The principle of accountability, as it is generally understood, requires those who spend public money to accept the responsibility to spend it wisely and for the purpose intended, to report to the public in a transparent way on how the funds were spent and the results achieved, and to accept responsibility for those results.

As I have implied earlier in this chapter, I intend to extend the concept of accountability, borrowing from the education researcher Richard Elmore, who uses the term "reciprocal accountability."[8] In the context of Ontario's publicly funded education system, reciprocal accountability means that every demand by the public and the Province for improved performance involves a responsibility to provide appropriate resources to meet the demand, *and* that every investment accepted requires school boards, principals, teachers, and other staff to demonstrate accountability for using those resources efficiently and effectively for the purpose intended. As I mentioned above in the section on affordability, the process for determining appropriate resources should involve continuous review and continuous dialogue between the Province and representatives of all levels of the education community.

Reciprocal accountability must be transparent. For the funding formula to earn the confidence and support of the public, people must be able to understand how it works, how the money has been spent, and what has been achieved. Finally, reciprocal accountability requires a climate of mutual trust and respect, an eagerness to initiate and accommodate change, and a willingness to do the work and provide the resources to sustain it.

# 4. Issues and Recommendations

## Introductory Comments

My recommendations, which are set out in this chapter and listed as a group in Chapter 5, are based on my view of the roles and responsibilities of the partners in the education sector and the guiding principles outlined in Chapter 3, as well as on my research and consultation process. I believe that my recommendations respond directly to the mandate I was given – they are aimed at improving equity, fairness, certainty, and stability in the funding of public education in Ontario. Most important, I believe that, if implemented, they will help advance the goal of continuous improvement in student learning and achievement.

Many of those who participated in my consultations, particularly those who attended the roundtable discussions and my meetings with representatives of stakeholder associations, expressed the view that the student-focused funding formula is sound as a concept, if not fully realized in practice, and that it is definitely more reasonable and equitable than the grants-and-property-tax-based system it replaced. I heard general support for the goals of the three main components of the formula's structure:

- the Foundation Grant, which is intended to fund education needs common to all Ontario students
- the Special Purpose Grants, which recognize that particular students and particular districts may have distinct, additional funding needs that are not common to all students and districts
- the Pupil Accommodation Grant, which is intended to fund student accommodation needs

In my research, I found that this type of formula, where a basic grant that provides a common level of service is combined with specific grants that address particular student needs and district costs, is used in several other jurisdictions, including British Columbia and Alberta.

At the same time, almost everyone I heard from said that the amount of funding allocated to education in Ontario is inadequate. That is, for virtually all school board and school stakeholders, *adequacy* of funding is the issue, more than the structure of the formula itself, although stakeholders did express concern about the structure as well. I address these concerns throughout this chapter.

Many presenters also expressed concern about the absence of both an annual process for reviewing and updating the formula to reflect increased costs and a regular, more comprehensive process for reviewing the formula to evaluate how well it is working and whether it continues to meet the Province's objectives for it.

I often asked those who raised the issue of adequacy, “How much is enough?” No one suggested that the amount should be limitless. Many maintained, however, that we cannot afford *not* to make an adequate investment in education. To my mind, the word “investment” is key. The answer is not to just throw money at education; it's to make strategic investments in the goal of continuous improvement.

I agree that the disparity between the benchmark costs in the funding formula, which for the most part are based on 1997 board costs, and the actual costs facing boards today is a problem. I believe that, within the limits of the Province's fiscal resources, the education allocation must keep up with both enrolment changes and recognized cost pressures. My recommendations, therefore, focus to a large extent on ensuring that funding is maintained at a level that will allow boards to meet the Province's education objectives and on conducting regular reviews to update the benchmark costs in the formula. I also recommend several new investments, address issues related to some aspects of the formula's structure, and recommend modifications to some specific grant components.

I am most appreciative of all of the comments and advice I received from stakeholders and community members associated with school boards throughout the province – urban, rural, and northern; large and small, public and Catholic, English- and French-language. I have not, however, been able to make a recommendation on every issue or concern presented to me during the consultations, as worthy of attention as they are. Some are simply beyond the scope of my mandate. Others did not directly relate to funding issues. Still others, when I examined them more closely, appear to be at their core issues that could be managed locally if adequate funding were available. I believe that my recommendations concerning adequacy of funding and new investments, if implemented, will resolve many of these issues.

I emphasize, however, that all of the comments and advice I received have helped inform my recommendations.

Unless otherwise noted, my recommendations are for measures that, if implemented, would begin to take effect in the 2003–04 school year as part of a multi-year funding plan. By “multi-year funding plan,” I mean over three years. The government may wish to fully implement some measures earlier.

However, I am making three recommendations that apply to the current school year, 2002–03. These three recommendations are for:

- an allocation of funds for boards' current round of collective bargaining with their teaching and support staff
- funding under the Special Education Grant for approved Intensive Support Amount (ISA) claims that boards submitted to the Ministry of Education through to the end of the third cycle of the ministry's review of ISA funding
- funding for the immediate cost pressures boards face related to student transportation

These three recommendations reflect the priorities that I discerned through my consultations and subsequent analysis of the issues. I believe that if these recommendations are implemented in the 2002–03 school year they will foster stability in the education sector.

## Benchmarks

School board trustees and administrators told me that inadequate funding has compromised their ability to allocate appropriate funding to important programs and services. They said that, to honour the contracts they have negotiated with their teachers and support staff, they have had to reduce their allocations to other areas such as school operations, professional and para-professional services, and school libraries. I was told that, with a few exceptions, the benchmark factors and costs in the funding formula have not been updated since the formula went into effect in 1998 and that, where updates and investments in new initiatives have occurred, they have not matched actual cost increases. Presenters maintained that the benchmarks need to be updated to reflect actual costs. They also suggested that a multi-year approach to funding education would provide them with relative stability and an element of predictability in planning. I note that a multi-year approach would also provide the Province with an element of predictability in its own planning.

With one exception, every grant in the formula is calculated in part on the basis of benchmark costs.[9] Benchmark costs affect the amount of funding boards receive to cover their costs in the areas of salaries and benefits for administrators, teachers, and support staff; learning resources such as textbooks, classroom supplies, computers, and related administrative costs; school operations, including heating, lighting, maintenance, cleaning, and insurance; and construction, including renovations and major repairs ("school renewal") and additions or new buildings ("new pupil places").

**I recommend that:**

1. the Ministry of Education update the benchmark costs for all components of the funding formula (the Foundation Grant, the Special Purpose Grants, and the Pupil Accommodation Grant) to reflect costs through August 2003, and that funding that reflects these updated benchmark costs be phased in over three years, starting in 2003–04, as part of a multi-year funding plan

*I estimate that the updated benchmark costs covering costs through August 2003 will total $1.08 billion, excluding the additional cost of updating salaries and benefits in 2002–03 (see recommendation 2). The $1.08 billion estimate comprises updates of benchmark costs to August 2002 ($1.01 billion) plus updates of non-salary-and-benefit costs to 2003 ($70 million). The estimated $1.08 billion should be phased in over three years, starting in 2003–04, as part of a multi-year funding plan.*

Appendix H outlines the approach I used in estimating the cost of updating the benchmarks. It notes that the base year for my updates is 1998, the year the current funding formula came into effect, with three exceptions where the Ministry of Education has added funding since 1998 and prior to 2002–03. See Appendix H for more details. Appendix I contains a table (Table I.1) that shows the estimated cost of updates by grant and grant component. Appendix J contains four tables.

Table J.1 and J.2 show the estimated cost of updates by individual benchmark (Table J.1 is a summary; Table J.2 offers more detail). Tables J.3 and J.4 respectively provide detailed calculations for the update to the Transportation Grant and the update to the School Operations Allocation of the Pupil Accommodation Grant.

I point out that some of the updates to benchmark costs in the Foundation Grant will have a ripple effect. For example, updating benchmark costs for classroom supplies will affect not only the Foundation Grant, which provides a basic per pupil allocation for classroom supplies, but also certain Special Purpose Grants that, for eligible boards, supplement the basic per pupil allocation with additional funds.

In August 2002, many boards entered into a new round of collective bargaining with their teaching and support staff. The amount of additional salary and benefits costs and their effect on boards' current-year (2002–03) budgets will of course not be known until the negotiations are complete, but to foster stability in the education sector, I am recommending that the ministry allocate funds to school boards in the current fiscal year for their current negotiations.

**I recommend that:**

2. **to foster stability in the education sector, the Ministry of Education allocate funds to school boards in the current school year (2002–03) for the current round of collective bargaining with teaching and support staff**

I acknowledge that the costs involved in recommendations 1 and 2 are substantial. However, my guiding principles of adequacy and accountability, outlined in Chapter 3, compel me to recommend that the government provide an adequate amount of funding, within the bounds of the fiscal resources available to it, for the high level of academic achievement it expects.

If, as I said at the beginning of this report, the funding formula is an instrument for achieving the policy goal of continuous improvement in student learning and achievement, and if we want to ensure that a high level of achievement is sustained, the formula needs to be reviewed and updated on a regular basis. Only in this way will it continue to be an effective tool. Regular reviews should investigate whether the formula is meeting current needs, including special needs such as those related to geographic circumstances, readiness to learn, special education, and French-language education. I also believe that, as part of the review process, boards should demonstrate in a transparent way that they are spending the funds for the purposes for which they were intended.

**I recommend that:**

3. **the Ministry of Education, in consultation with school boards and other members of the education community, develop mechanisms for annually reviewing and updating benchmarks in the funding formula and for conducting a more comprehensive overall review of the funding formula every five years**

While I am not recommending a specific review process, I suggest that the process involve the establishment of a co-ordinating committee, which would include stakeholder representatives and report to the Minister of Education, and subcommittees, which would also include stakeholder representatives and which would review benchmark factors and costs in individual grants and report to the co-ordinating committee. The co-ordinating committee and subcommittees could conduct both the annual review and the five-year review. The five-year review could consider structural changes to the funding formula and the impact of long-term changes in circumstances. Among the issues that could be considered are the effective and efficient use of resources by boards, accountability mechanisms, and the projections that indicate province-wide declines in enrolment over the coming years. Implicit in recommendation 3 above is the need for a multi-year funding model to provide relative stability and an element of predictability that would help both school boards and the government plan effectively.

## Effectiveness of the Formula for Distributing Funds among Boards

Many of those who made presentations and submitted briefs expressed concern about the effectiveness of the formula for distributing funds among boards. I heard from northern boards that the formula does not sufficiently recognize the higher costs associated with the geography of their districts, such as the long distances students have to travel to get to school and the difficulties experienced by boards and schools in remote areas in obtaining the resources they need. French-language boards mentioned similar issues, as well as the higher costs of French-language curriculum and other learning materials and the difficulty of securing francophone specialists for programs and services, particularly in the area of special education. From the urban boards, I heard about the challenges associated with educating recent immigrants, students with special needs, and students at high risk of academic failure or dropout. Finally, several boards throughout the province described the challenge of meeting the needs of Aboriginal students.

As I noted earlier, the Ministry of Education, through the Special Purpose Grants, recognizes that one size does not fit all when it comes to education in Ontario. Special Purpose Grants were designed to address the different needs among students and among different parts of the province. Because these grants are generally well designed and supported by the education community, I believe that the recommendations I have made about updating the benchmark costs, if implemented, will go a long way towards redressing some of the problems identified above.

I deal later in this chapter with school renewal, special education, student transportation, and some other issues, but here I want to discuss four specific issues that I believe need to be addressed to improve the effectiveness of the formula for distributing funds. The first involves readiness-to-learn programs for students experiencing difficulties in school. The second is the higher costs incurred by French-language boards. The third is the sustainability of small schools that serve unique needs in their communities. The fourth is declining enrolment. Special Purpose Grants now address these issues to some extent but, in my opinion, they do not address them fully enough. In some cases, I am recommending new strategic investments in existing grants; in other cases, I am recommending changes to the grant allocation; in one case, I am recommending a new grant.

## Readiness to Learn

An important part of achieving continuous improvement in student learning and achievement is reducing the gap between high and low performers while maintaining high standards.[10]

An extensive literature documents the link between socio-economic disadvantage and poor results in school, as well as the success of appropriate preventive and remedial interventions in preparing children to learn, particularly in their early years.[11]

Studies have shown that one of the best predictors of a child's success in school is "readiness to learn" as he or she starts school. In *The Early Years Study*, the Honourable Margaret Norrie McCain and J. Fraser Mustard stress the important role that can be played by family and child development services in helping preschool children overcome early disadvantages.[12] Investments in early learning bring significant paybacks. According to James Heckman, a University of Chicago economist and winner of the Nobel Prize in economics, "Investing in the very young is the most economically efficient investment society can make."[13] Investments in learning readiness can prevent problems from arising later in school and can thus reduce the need for remedial programs in the future.

McCain and Mustard and others also suggest that children may require interventions from sources other than schools – for example, community and social services, health professionals and health agencies, recreational services, community police, and correctional and custodial services. In other words, education interventions are not the only ones needed. Other service providers, including other provincial ministries (not just the Ministry of Education), other levels of government (federal and municipal), and community groups should also be involved and should contribute to the costs of delivering the services involved, although the local community school may be the best location for delivering these services.

Although early intervention is critical to improving a young child's chances of success in school, effective readiness-to-learn programs are needed for all students at risk of experiencing difficulties in school, whether they are preschool, school-age, or about to make the transition from school to postsecondary education or work.

The present funding formula contains three Special Purpose Grants that school boards can use, in addition to the Foundation Grant, for readiness-to-learn programs and services: the Learning Opportunities Grant, the Language Grant, and the Early Learning Grant.

With each of these grants and grant components, boards have the flexibility to spend the funds on the programs and services they believe will help students achieve the greatest degree of success. Some boards, for example, have chosen to offer full-time Junior Kindergarten while others prefer to offer special literacy programs for preschoolers. This flexibility is important because it allows boards to determine what works best for their students.

In this report, I will be recommending a new investment in the Learning Opportunities Grant as well as a change in the structure of the Foundation Grant's Local Priorities Amount. If implemented, both of these recommendations will give boards additional flexibility to dedicate funds to support readiness-to-learn/at-risk programs and services.

While the existing grants can be used effectively by boards for readiness-to-learn programs for students at risk at all three stages – preschool, in-school, and the school-to-work/postsecondary education transition phase – they need to be looked at under the lens of readiness to learn. It may be that by viewing them this way the Ministry of Education and school boards will determine that to serve at-risk students best some grants should be merged or new grants added to ensure that all stages are adequately covered.

**I recommend that:**

4. **the Ministry of Education, in consultation with school boards, other members of the education community, and other appropriate stakeholders, review and consider grouping all of the Special Purpose Grants in the funding formula that have a focus on readiness to learn for preschool children, in-school students, and youth making the transition from school to work/postsecondary education, with the goal of ensuring that these Special Purpose Grants are designed to meet the needs of at-risk children and youth effectively**

Many presentations to and submissions received by the task force claimed that the Learning Opportunities Grant, the Language Grant, and the Early Learning Grant are inadequately funded. I estimate that the updates to benchmark costs recommended earlier in this chapter, if implemented, will generate an increase of approximately $45 million for these three grants combined.[14] (See Appendix I, Table I.1.) Although I believe that the issue of adequacy will be addressed to a large extent through the recommended updates, some specific funding issues were raised that need to be considered further.

### Learning Opportunities Grant

The Learning Opportunities Grant (LOG) provides boards with funds to assist students at risk of experiencing difficulties in school. The LOG consists of three components:

- Demographic Component
- Early Literacy Component
- Literacy and Math for Grades 7 to 10 Component

Issues that were raised with me with respect to the LOG primarily addressed the Demographic Component of the grant. This component provides funding to school boards on the basis of social and economic indicators that have been associated with students experiencing a higher risk of difficulties in school. Boards have the discretion to use these funds to offer a wide range of programs to improve the level of achievement of these students. They can use these funds, for example, for additional educational assistants and counsellors, literacy and numeracy programs, smaller class sizes, expanded Kindergarten programs, before- and after-school programs, recreational and sports activities, nutrition programs, excursions, parenting classes, and home/school linkages.

In 1997, an Expert Panel on the Learning Opportunities Grant, appointed by the Ministry of Education and Training, recommended that the ministry collect data for at-risk programs from a representative sample of school boards that offer effective programs and practices for students at risk, and that it use this data to determine the appropriate funding magnitude for the LOG.[15] I support their recommendation.

**I recommend that:**

5. the Ministry of Education determine the appropriate funding magnitude of the Demographic Component of the Learning Opportunities Grant by collecting and analysing data on programs and services for students at risk from a representative sample of school boards that offer effective programs and services of this nature

Until this information is available, there is no objective basis for me to make a recommendation on the magnitude of the LOG. I believe, however, that programs and services for students at risk are so important in reducing the gap between high and low performers that the ministry should put an additional $50 million into readiness-to-learn programs even before the results of the cost analysis are complete. I am recommending that these funds be added to the LOG as an interim measure, until the appropriate data has been collected and analysed (as per recommendation 5), and that these additional funds, like the existing LOG funds, be made available to boards to use for the programs and services they believe will improve their at-risk students' readiness to learn.

**I recommend that:**

6. as an interim measure, pending the collection and analysis of the data on programs and services for students at risk described in recommendation 5, the Ministry of Education invest an additional $50 million in the Demographic Component of the Learning Opportunities Grant, using the current allocation model based on the 1996 census

The ministry uses two methods to determine boards' allocation for the Demographic Component of the LOG. For most of the allocation, the ministry uses 1991 census data to look at the socio-economic characteristics of each school board's catchment area. For the rest of the allocation, the ministry uses a new student-focused method that is based on recommendations made by a stakeholder working group in the fall of 2001. Under this new method, the ministry uses 1996 census data to look at the socio-economic characteristics of the neighbourhoods in which students of each school live.

Although, for the most part, the new allocation method focuses more accurately on at-risk students, I understand that it may need further refinement. I believe that the overall allocation method for this component of the LOG should be reviewed to ensure that it is an accurate and appropriate model for predicting students at risk, and that 2001 census data should be used as the basis for determining allocations under this component.

**I recommend that:**

7. the Ministry of Education review the current allocation models for the Demographic Component of the Learning Opportunities Grant to ensure that the distribution of funds to school boards under this grant is fair and equitable, and further, that the ministry update the socio-economic factors in the formula using 2001 census data

At present, boards are required to use the Literacy and Math for Grades 7 to 10 Component of the LOG for after-school and summer programs. I was told that many boards are not making full use of the funds available through this component because of these restrictions. To ensure that Grades 7 to 10 students who need remedial literacy and math programs are offered the assistance they need, I believe that the ministry, beginning in 2003–04, should reallocate the unused portion of this component to the LOG for programs and services that will serve the remediation needs of these students. As part of their accountability, boards should be required to report on how the funds have been used for this purpose.

**I recommend that:**

8. beginning in 2003–04, the Ministry of Education reallocate the unused portion of the Grades 7 to 10 Component of the Learning Opportunities Grant (LOG) to the LOG for programs and services for students who need remedial literacy and math programs, and further, that the ministry require school boards, as part of their accountability, to report on how the funds have been used for this purpose

Finally, while it is important that school boards be given the flexibility to use the LOG funds as they determine is best for their students, I believe that boards have a responsibility to report publicly both on how these funds are being used to reduce the gap between high and low performers while maintaining high standards and on the results achieved from the expenditure of these funds.

**I recommend that:**

9. the Ministry of Education require school boards that receive funds through the Learning Opportunities Grant to report publicly on how the expenditure of these funds is contributing to continuous improvement in student achievement and to the reduction of the performance gap between high and low achievers in their schools while maintaining high standards

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### Language Grant

One significant at-risk student population is students for whom the language of instruction (English or French) is a second language. Many of the presentations made by members of the public and by stakeholder organizations suggested that many of these students are not adequately prepared for school even in their first language.

The Language Grant comprises two components, which provide language funding for recent immigrants and for Canadian-born students who lack proficiency in the language of instruction: English as a Second Language/English Skills Development (ESL/ESD) for students in the English-language system and *Actualisation linguistique en français/Perfectionnement du français* (ALF/PDF) for students in the French-language system. The "recent immigrant" sections of the formula for allocating ESL/ESD and PDF take into account three years of data. In both cases, the level of per pupil funding declines with each successive year. The formula does not prescribe how boards should spend these funds or over how long a period they may spend them.[16]

The perception among stakeholders, however, is quite different. I heard from many stakeholders that the funds can only be used for three years.

Presenters told the task force that successful language training requires five to seven years. My research revealed that the ESL grant in British Columbia recognizes the additional cost of providing language instruction for a maximum of five years. I estimate that the updates to benchmark costs recommended earlier in this chapter, if implemented, will increase the Language Grant by $25 million.[17] (See Appendix I, Table I.1.) However, I believe that even this increase is insufficient to permit boards to provide the students who need to master the language of instruction with the training they require.

**I recommend that:**

10. the Ministry of Education increase the funds allocated under the Language Grant to reflect five years of language training for English as a Second Language/English Skills Development and for *Perfectionnement du français*

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*I estimate that the increase to the Language Grant for English as a Second Language/English Skills Development and* Perfectionnement du français *to reflect five years of language training will cost $65 million.*

On a related point, many presenters appeared to believe that Canadian-born students who lack proficiency in the language of instruction are not eligible for ESL/ESD and ALF/PDF funds or accounted for in the formula, although they are.[18] I believe that the real problem is that the formula does not provide adequate funding to meet the needs boards experience in this area. My recommendations 1, 2, and 10, if implemented, will increase the funding available through the Language Grant, and therefore should improve boards' resources in this area.

### Needs of Aboriginal Students

The federal Royal Commission on Aboriginal Peoples addressed issues related to Aboriginal education and concluded the following:

> For more than 25 years, Aboriginal people have been articulating their goals for Aboriginal education. They want education to prepare them to participate fully in the economic life of their communities and in Canadian society. But this is only part of their vision. Presenters told us that education must develop children and youth as Aboriginal citizens, linguistically and culturally competent to assume the responsibilities of their nations. Youth that emerge from school must be grounded in a strong, positive Aboriginal identity. Consistent with Aboriginal traditions, education must develop the whole child, intellectually, spiritually, emotionally and physically.[19]

Responsibility for Aboriginal people lies primarily with the federal government, which provides Native bands with funding for, among other things, education. When Aboriginal students who live on reserves attend schools of a local school board, their bands make tuition agreements with the boards, using funds from the federal government, to pay for the education of the students involved. Tuition agreements provide the same amount of money per pupil for a board as the ministry's funding formula provides for the board's resident students.

I heard, in presentations and submissions to the task force by representatives of the Chiefs of Ontario and others, that Aboriginal students in many areas of Ontario, but particularly in the northwest, are achieving results in the Education Quality and Accountability Office's literacy and numeracy tests for Grades 3, 6, and 10 students at a rate well below that of the general student population. I also heard that the graduation rate of Aboriginal students is very low and that it is expected to be even lower now that the Ontario Secondary School Literacy Test (the Grade 10 literacy test) has been introduced. A further concern was expressed about Aboriginal students who arrive at school inadequately prepared to learn, particularly with respect to their skills in the language of instruction.

Because of the federal government's responsibility for Aboriginal people, I believe that it must assume a greater level of funding responsibility for Aboriginal students' readiness to learn when they make the transition from often remote reserves, where they may not have been speaking the language of instruction, to the urban centres where the schools are located. My discussion of the needs of Aboriginal students attending Ontario's publicly funded schools, however, focuses on provisions in Ontario's current education funding formula for boards' needs with respect to Aboriginal students.

Aboriginal status is one of the socio-economic indicators used to calculate the size of the at-risk student population for purposes of the LOG. The indicator is the percentage of persons who, in the census, gave "Aboriginal" as their sole ethnic origin. In view of what I have learned about the level of achievement of Aboriginal students in Ontario's schools, I am concerned that the present LOG may not be providing boards with sufficient funds to meet the needs of these students.

At the Forum on Aboriginal Student Achievement convened by the Ministry of Education in Thunder Bay in October 2002, the Northern Ontario Education Leaders (NOEL) made several recommendations that apply to the Ontario education sector. I urge the Ministry of Education to review, analyse, and consider implementing the recommendations that came out of that forum.

I understand, from comments made by NOEL at the forum in October 2002 and from additional research, that other provinces have introduced special grants for Aboriginal students. In British Columbia, for example, school districts receive a supplement of $950 (2002–03) for each Aboriginal "full-time equivalent" student. This targeted grant requires school districts to spend this money on Aboriginal education with a view to improving this at-risk group's level of achievement. While there is insufficient data to determine the magnitude of the funding needed to meet the education needs of Aboriginal students in Ontario's publicly funded school systems, and such a needs assessment is a necessary first step, I am nevertheless recommending, as a priority, that once this data has been gathered, the Ministry of Education implement a grant targeted at the educational needs of Aboriginal students who are not living on reserves.

**I recommend that:**

11. **the Ministry of Education obtain accurate data to establish the extent of school boards' needs related to the provincial role in the education of Aboriginal students and, on the basis of this data, implement a new grant targeted at the educational needs of Aboriginal students who are not living on reserves, and further, that the ministry require boards that are eligible for this grant to spend it on programs and services for Aboriginal students and to publicly account both for the expenditures and the results achieved**
12. **the Province work with Aboriginal leaders and the federal government to ensure that there is an integrated approach to and adequate funding for the education of Aboriginal students**

### Integrated Services for Children

At the beginning of this "Readiness to Learn" section, I discussed some of the research that indicates that preschool children, in-school students who are experiencing academic difficulties, and students preparing to make the transition from secondary school to the workplace or postsecondary education may require interventions from a variety of service providers to improve their readiness to learn and their chances for success in school and later in life.

In 1997, the Expert Panel on the Learning Opportunities Grant, in its report to the Minister of Education and Training, noted that at-risk students often have multi-dimensional problems that require multidisciplinary solutions.[20] These students come to school with a variety of health care and social service needs. Schools are increasingly under pressure to provide services, such as speech therapy or occupational therapy, that respond to these needs, even though these services may properly be the responsibility of the federal government, provincial ministries other than the Ministry of Education, municipalities, or community organizations, or a combination of these entities.

Several provincial ministries and municipal agencies do focus on and provide services to families of at-risk students, but these services are not usually offered in a co-ordinated fashion. Children who require services from two or more government or non-government organizations often encounter gaps or duplication in service, which is frustrating for both the children and their parents. In my opinion, schools, community and social services, health professionals and agencies, recreational services, community police, and correctional and custodial services – and the federal, provincial, and municipal government ministries and agencies responsible for them – must collaborate in providing and in funding these services.

Integrated services would go a long way towards helping schools meet students' needs in all of the readiness-to-learn areas I have discussed in this section of the report, as well as special education needs.

The Ministry of Education, through its Special Education Project and in collaboration with the Ministry of Health and Long-Term Care and the Ministry of Community, Family and Children's Services, is analysing service co-ordination issues and developing policy recommendations. To ensure that the policy recommendations reflect the views of all ministries and stakeholders involved in and concerned about special education issues, the project created an umbrella group, the Co-ordinated Services Advisory Committee. I applaud this initiative.

At the same time, I believe that a more wide-ranging and higher-level initiative is required to co-ordinate services, and the funding of services, for at-risk children and youth. I am therefore recommending a Cabinet-level advisory council to encourage collaboration and co-ordination of such services and funding. Although I believe that the funding mechanisms need to be aligned, I recognize that ultimately the taxpayer pays for these services, regardless of which ministry provides them.

**I recommend that:**

**13. the government establish a Cabinet-level advisory council on integrated services for children and families, composed of representatives from the Ministries of Community, Family, and Children's Services, Education, Health and Long-Term Care, Public Safety and Security, and Tourism and Recreation, to meet on a regular basis to align the work and the funding mechanisms of the ministries that serve families, children, and youth**

### Needs of French-Language Boards

The brief submitted to the task force by the 12 French-language boards, together with the Association des conseillères et des conseillers des écoles publiques de l'Ontario and the Association franco-ontarienne des conseils scolaires catholiques, pointed out that the costs incurred by French-language boards are significantly higher than those of English-language boards. They highlighted three reasons for the higher costs.

First, French-language boards have facilities, enrolments, and average school sizes that are smaller than those of English-language boards. As a result, French-language boards generally cannot benefit from economies of scale in the same way that English-language boards do. Second, French-language boards operate over vast territories. The distances between schools and board offices make it difficult to share resources and require more travel, both of which increase costs. Third, material resources, specialized human resources, and community support in the French language are extremely difficult to obtain and often non-existent in the communities served by French-language boards. This lack of resources and supports leads to additional costs as French-language boards try to offer programs and services comparable to those offered by their English-language coterminous boards. It also makes it difficult for them to maintain the French-language learning environment and cultural values they are striving to provide for their students.[21]

Grants in the funding formula address many of the concerns expressed by the French-language boards, and I believe that my recommendations will also do so. For example, increased grants for small schools and for transportation, which I recommend later in this chapter, if implemented, will be of particular benefit to French-language boards because of their size and the distances travelled by their students. My recommended updates of benchmark costs and a recommendation I make later in this chapter related to the Local Priorities Amount, if implemented, will increase funds for all boards. Notwithstanding these recommendations, I believe that the Ministry of Education should review and amend as necessary all components of the funding formula to ensure that each of the grants recognizes the higher costs experienced by French-language boards.

**I recommend that:**

14. the Ministry of Education review the brief submitted to the task force by the 12 French-language school boards, together with the Association des conseillères et des conseillers des écoles publiques de l'Ontario and the Association franco-ontarienne des conseils scolaires catholiques and amend the funding formula as appropriate to ensure that each of the grants in the formula recognizes the higher costs experienced by French-language boards in delivering education programs and services

## Small Schools

I heard many presentations and received many submissions from parents, school councils, trustees, boards, MPPs, and municipal representatives emphasizing the importance of sustaining small schools in their communities. I found the arguments for keeping small schools open most compelling when the school involved was the only school a board had in the community. Where these schools face the prospect of closing, people want to find some way to keep them open. Where a decision has been made to keep these schools open, people are concerned that the funding formula limits the ability of boards to obtain the core-staffing support these schools need to offer a high-quality education and a safe learning environment to their students.

Usually, small schools are candidates for closure because their enrolment is small in relation to the capacity of the building. In addition, the school's enrolment may be so low that it falls below the benchmark factors in the funding formula. These benchmark factors require that a certain board-wide average school size be met before sufficient funding is generated to maintain a school building and to provide the core staff, programs, and services needed to create a high-quality and safe learning environment in that school.[22]

In general, a decision to close a small school and move the students to another school or to "consolidate" two or more small schools represents responsible management on the part of school boards. In most instances, consolidation provides students with a greater concentration of learning resources and educational opportunities in one location. However, consolidation of schools in rural, northern, and French-language boards may significantly increase students' school-bus travelling time, adversely affecting the overall educational experience of the students involved, and result in the closing of a building that has been a hub for community activities.

Distance and travelling time are important criteria to consider in determining whether to close a small school or keep it open. Other key criteria should include the physical condition of the school, enrolment levels, the presence or absence – because of low enrolment – of specialized programs, and whether the school is the only one serving a unique need in the community, such as providing French-language education.

When a board has decided, on the basis of credible criteria and a transparent decision-making process, to keep a small school open, it is important that the school receive core-support funding to ensure that it has a sound foundation from which to create a high-quality and safe learning environment. In my view, the minimum core supports needed by a small school are a full-time principal and secretary, a full-time custodian, and, at the secondary school level, a full-time individual to provide advice on career and postsecondary education to secondary school students and advice to Grade 8 students on secondary school placements.

For many boards, the funding formula provides a certain amount of core-support funding through the following grants and allocations. Under the School Operations and School Renewal Allocations of the Pupil Accommodation Grant, if a school's enrolment is below the school's capacity, additional "top-up funding" is provided. The Small Schools Allocation and its Principals Component and the Remote and Rural Allocation of the Geographic Circumstances Grant also contain additional funding for small schools.

In addition, some boards have an average school size that, by itself, is sufficient to generate funds for a principal for a small school that they have decided to keep open, although they may not be able to fund the other core elements described above. In a number of cases, boards that do not have the requisite average school size have decided to allocate funds – often at the expense of other program areas – to meet some or all of the core-support staffing needs of the small schools that they have decided to keep open.

The updating of benchmark costs that I recommended earlier in this chapter offers a partial response to this situation, because, if implemented, it will provide many boards with additional funding to sustain those small schools that they decide to keep open. Grants that are particularly likely to generate increased funding for small schools include the Foundation Grant, certain Special Purpose Grants mentioned above (the Small Schools Allocation and its Principals Component and the Remote and Rural Allocation of the Geographic Circumstances Grant), and, also mentioned above, the School Operations and School Renewal Allocations of the Pupil Accommodation Grant. These updates are also likely to allow boards to cover the costs of any additional staff or programs that they have determined, in their decision-making process, are required in the small school that they are keeping open.

In addition to staff and programs, all schools need to provide students with a safe, clean, and well-maintained environment. I estimate that updating the benchmark costs will increase the School Operations Allocation, which covers custodial services (among other aspects of operating a school), by approximately $165 million.[23] Moreover, as noted above, the existing funding formula contains a provision for top-up funding of both the School Operations and the School Renewal Allocations for schools that are operating at less than full capacity (although certain limitations apply). These two provisions are likely to provide boards with the funds they need to ensure that their small schools are safe, clean, and well maintained.

Nevertheless, where a board has a small school in a single-school community, it may need additional core-support funding for that school. In this situation, consolidation of the school with another one in the community is not a choice. In addition, boards in this situation generally have smaller board-wide enrolments than other boards and, as a result, it is likely that they will derive only a limited benefit from updates to the benchmark costs. I am therefore recommending that the Ministry of Education provide them with additional funding through the Geographic Circumstances Grant to enable them to achieve the core-support staffing that will make their small schools viable enough to provide a high-quality and safe learning environment.

**I recommend that:**

15. the Ministry of Education allocate core-support funding through the Geographic Circumstances Grant to school boards that have decided to keep open a small school in a single-school community and that, under the updated Foundation and Special Purpose Grants (that is, updated as described in recommendation 1), do not have an average school size that is sufficient to generate funding for core-support staff for that small school, and further, that the core-support funding cover the following:
    - a full-time principal and secretary for each elementary and secondary school
    - a full-time support staff person for each elementary and secondary school to ensure a safe, clean, and well-maintained school, and
    - a full-time individual in a secondary school to provide advice on careers and postsecondary education to secondary school students and advice to Grade 8 students on secondary school placements

*I estimate that core-support funding for small schools in single-school communities will cost $50 million.*

I believe that the intent of recommendations 15 is clear – where a board has made a decision, on the basis of credible criteria and a transparent decision-making process, to keep a small school open, the board should receive the core-support funding it needs to provide a high-quality and safe learning environment in that school. The availability of this core-support funding should not, however, be interpreted by boards as encouragement to keep schools open when, in the board's judgement, closure and consolidation are possible and in the best interests of student learning and the district's overall plan and goals.

One further issue that needs clarification is the relationship between the capacity of small schools in single-school communities and the process for justifying "new pupil places" – that is, additions to schools or new schools. At present, to justify new pupil places, only boards whose elementary and secondary enrolments exceed the "rated" capacity of their schools are eligible for funding for new pupil places.[24] I urge the ministry to review the benchmark factors and capacity criteria in the New Pupil Places Allocation of the Pupil Accommodation Grant to ensure that boards that have small schools in single-school communities are not penalized for keeping those small schools open.

### Declining Enrolment

The Declining Enrolment Adjustment was introduced in the current year (2002–03) against a backdrop of decreased enrolments in some boards. I heard that the major concern about this grant is the length of time the Ministry of Education allows a board to bring its costs in line with its decreased enrolment levels. The grant allows for a two-year adjustment period. Many presenters suggested that this period should be extended to three years.

Because enrolment is projected to decline across the province over the next few years, the issue of the period of adjustment will be a matter of increasing concern to many boards. Boards' revenue is based to a large extent on enrolment. When enrolment declines, board revenue declines as well. However, because many of a board's expenditures are fixed costs, boards often find it hard to adjust their expenditures as quickly as their revenue declines. They need time to adjust, and I am persuaded that two years is not enough.

**I recommend that:**

16. the Ministry of Education extend the duration of the Declining Enrolment Adjustment to three years

*I estimate that extending the duration of the Declining Enrolment Adjustment will cost $5 million.*

Earlier in this chapter, I recommended that the Ministry of Education work with stakeholders to "develop mechanisms for annually reviewing and updating benchmarks in the funding formula and for conducting a more comprehensive overall review of the funding formula every five years" (recommendation 3). In view of the projections for declining enrolment, one of the aspects of the formula that the ministry and its stakeholders may wish to review is the enrolment-sensitive nature of the student-focused funding formula. Some board costs that are funded on a per pupil basis, such as those related to small schools and special education, may be particularly affected by declining enrolment. I suggest that such a review is warranted.

## Boards' Flexibility with Respect to Local Expenditures

Flexibility is one of the guiding principles of my recommendations – that is, that the funding formula should allow boards and their schools a certain amount of discretion in assessing their local needs and in spending part of their funding allocation to address those local needs that advance the continuous improvement of student learning and achievement.

The Foundation Grant's Local Priorities Amount (LPA), introduced in 2001–02, is a per pupil allocation that was intended to give boards the flexibility to address local priorities. I was told during my consultations, however, that boards do not use these funds for local priorities. Instead, they direct them to areas that they feel are inadequately funded because the funding formula's benchmark costs have not been updated. Boards therefore maintain that, at present, they do not have sufficient flexibility to address local needs.

The updating of benchmark costs that I recommended earlier in this chapter, if implemented, will provide boards with additional resources. With adequate funds, boards will have more flexibility to fund programs that meet local needs, since only a few specific limits apply to their use of their allocations.[25]

During my consultations, boards outlined some of the local priorities they have and for which they would like to use the LPA. Some boards would like to use it to supplement other grants. For example, French-language boards consider full-time Junior and Senior Kindergarten to be both educational and cultural priorities, and they would like to use the LPA to fund them. (The funding formula provides funds for half-day Junior and Senior Kindergarten.) Other boards would like to reduce class sizes in Junior Kindergarten through Grade 3, especially where they have many at-risk students. Still others would like to use their LPAs to enhance their education programming in general.

There are other areas in which boards may wish to invest their LPAs. For example, some boards may want to invest in technology to implement distance learning. Others may want to use their LPAs to fund leadership- and capacity-building programs in local schools or groups of schools, as part of their efforts to continuously improve the level of student achievement.

I am recommending that the LPA be changed from a per pupil amount to 5% of the Basic Amount of a board's Foundation Grant. If this recommendation is implemented, and if the updates to benchmark costs and the regular reviewing and updating processes that I recommended earlier in this chapter are implemented, the LPA would grow in tandem with updates to the Foundation Grant. It would therefore enhance boards' flexibility to address their local needs and priorities.

To honour my guiding principle of reciprocal accountability, I believe that, in return for the LPA funding, boards should be required to demonstrate that they are using their LPA funds to advance the goal of continuous improvement in student learning and achievement in individual schools and in the district as a whole. They should consult, through their director of education, with their principals and school councils on how to use the LPA funds and then develop improvement plans for the use of these funds. They should then annually review the plans and report publicly to all stakeholders and to the Ministry of Education on the results achieved through the implementation of the plans, in individual schools and in the district as a whole.

**I recommend that:**

17. the Ministry of Education reconstitute the Local Priorities Amount as 5% of the Basic Amount of school boards' Foundation Grants (updated as per recommendations 1 and 2), and that boards apply the Local Priorities Amount to locally established priorities, programs, and services aimed at the continuous improvement of student learning and achievement
18. the Ministry of Education require school boards, through their directors of education, to consult with principals and school councils for the purposes of developing a plan for the use of the Local Priorities Amount, and to annually review the plans and report publicly to all stakeholders and to the ministry on the results achieved through the implementation of the plans, in individual schools and in the district as a whole

## School Renewal (Pupil Accommodation)

In my mandate, I was specifically asked to look at approaches to funding school renewal, including areas such as maintenance, repairs, and renovations. The funding formula addresses these areas through the Pupil Accommodation Grant, which has four components: School Operations, School Renewal; New Pupil Places, and Prior Capital Commitments. As with the Foundation Grant and the Special Purpose Grants, the major concerns I heard about the Pupil Accommodation Grant were related to adequacy of funding, particularly with respect to the School Operations, School Renewal, and New Pupil Places Allocations. In this section of the report, therefore, I focus on boards' costs in these areas.

### School Operations

The costs involved in operating a school include such items as insurance, heating, lighting, cleaning and other maintenance, and maintenance supplies and equipment. The benchmark operating cost per square foot has been set at $5.20 since the current funding formula was introduced in 1998. Since that time, however, boards have faced significant cost increases in most school operations areas. I believe that, as with other areas of the funding formula, the benchmark costs for the School Operations Allocation should reflect boards' actual costs.

If the updates to benchmark costs that I recommended earlier in this chapter are implemented, I estimate that boards will receive an additional $165 million under the School Operations Allocation.[26]

### School Renewal

The term "school renewal" is used to refer to major repairs and renovations needed by schools. Two school renewal issues were raised with me during the consultations: the first is related to the routine, cyclical requirement to repair and replace items such as roofs, windows, heating and ventilation systems, and electrical systems; the second is related to "deferred maintenance" or the backlog of repairs needed by schools that has accumulated over an extended period of time.

With respect to the first issue, various organizations have established guidelines for what is called "facilities renewal."[27] These organizations recommend that governments annually provide a minimum of 1.5% to 4% of the current facility replacement value of a building for renewal needs, including alterations that change the building's use as well as those that are made to conform to changes in building codes, building standards, and access requirements. At present, the Ministry of Education allocates $266 million to school renewal on an asset base of approximately $28 billion, which amounts to less than 1% of the current facilities' estimated replacement value.[28] I believe that this is inadequate to meet boards' school renewal needs.

With respect to deferred maintenance, I learned that the cost of repairs needed in schools is substantial – approximately $5.6 billion and growing. Boards claim that the backlog has accumulated as the result of many years of inadequate funding for school renewal. Boards and other stakeholders told me that, even if the province updates its benchmarks and provides adequate funding for school renewal, it will still face the question of how to address the backlog of necessary repairs.

The Ministry of Education has begun working with school boards to assess school renewal needs in an objective and systematic fashion. I fully support that initiative. It will provide better data with which to evaluate the full extent of deferred maintenance, identify areas of greatest need, and estimate, in a way that is relevant to Ontario's elementary-secondary education sector, the annual renewal costs associated with the existing inventory of schools.[29]

If the updates to benchmark costs that I recommended earlier in this chapter are implemented, I estimate that boards will receive an additional $25 million for school renewal.[30] However, because of the substantial backlog of school renewal needs, I am also recommending two new strategic investments.

First, I am recommending that the Ministry of Education allocate $50 million for boards to use to address their most pressing school renewal needs. The intent of this recommendation is to begin to reduce the significant gap between the ministry's existing School Renewal Allocation and current industry standards for facility renewal funding.

Second, I am recommending that, as part of the initiative to assess school renewal needs described above, the ministry provide an annual allocation of $200 million for boards to use to pay the principal and interest costs they would incur in financing the substantial capital borrowings they would need to begin addressing their deferred maintenance needs. The ministry should use the results of its school renewal needs assessment to determine how best to allocate these funds to boards to ensure that schools that are most in need of repair receive appropriate attention. The annual allocation of $200 million would be a "deferred maintenance amortization fund," which I estimate that boards could use to leverage $2 billion worth of financing for renewal work. The $2 billion figure was arrived at using the ministry's standard guidelines for the Pupil Accommodation Grant, which estimate that $1 in grants to cover principal and interest costs (amortization costs) will allow boards to leverage $10 in financing, based on a 25-year amortization period and an assumed interest rate of 8%. Such an amortization fund could significantly reduce the deferred maintenance problem faced by school boards.

I understand that the Ontario School Board Financing Corporation and the Ontario Financing Authority are discussing ways to secure the capital financing required for boards' deferred maintenance costs through the use of debentures. I support these discussions. The debenture route would ensure that boards obtain financing under the most favourable terms available in the investment market.

**I recommend that:**

19. the Ministry of Education make a new strategic investment of $50 million in the School Renewal Allocation for school boards to use to address their most pressing school renewal needs
20. the Ministry of Education allocate a new strategic investment of $200 million annually to a "deferred maintenance amortization fund," which would fund the principal and interest costs of school boards' payments to service the debts boards would incur in borrowing funds so that they could begin to address their deferred maintenance needs

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### New Pupil Places

My consultations revealed that boards generally support the concept and structure of the New Pupil Places Allocation, although I heard some concerns about both the current benchmark factors and the current benchmark costs. The allocation provides amortization funding for school boards to service their loans for construction of new schools and additions to schools.

Early in this chapter I recommend that all benchmark costs in the funding formula be updated. Appendix H explains my approach to updating benchmark costs in more detail. In it, I note that the Ministry of Education and its stakeholders will want to refine my approach for their own review and update of these costs. The benchmark construction costs for the New Pupil Places Allocation is one place where I am recommending that they make refinements.

There are two kinds of construction costs for new pupil places – "old" and "new." Once a school or a school addition is constructed and even once construction is well under way, the construction costs for that school do not change. Therefore, for the purpose of allocating the amortized funding, the ministry does not need to adjust these costs to reflect annual increases in cost indexes. However, the projected construction costs for new schools and major renovations and additions to existing schools are subject to inflationary and other increases. I believe that the funding for "new" construction should be subject to regular updates.

My estimate of the cost of updating the benchmark costs in the New Pupil Places Allocation does not differentiate between funding for "old" and "new" construction costs because of the difficulty involved in separating these two costs in the current funding allocation. In the following recommendation, I recommend that the Ministry of Education review this issue and ensure that funding for "new" construction reflects updated benchmark costs. (See also Appendix J, Table J.2.)

**I recommend that:**

21. the Ministry of Education review the benchmark costs in the New Pupil Places Allocation with a view to distinguishing between benchmark costs for construction that is under way or has been completed and benchmark costs for construction that is projected, and that it update and review, as described in recommendations 1 and 3, only the benchmark costs for construction that is projected

In my discussion of the issues related to school renewal, I mentioned the current deliberations between the Ontario School Board Financing Corporation and the Ontario Financing Authority on the best ways for boards to finance school renewal costs. I suggest that these deliberations include the most effective and efficient way to structure debt financing for new school construction and to help boards raise the necessary capital for this construction.

### Prior Capital Commitments

The Ministry of Education maintains a Prior Capital Commitments fund to help boards finance loans related to capital projects approved before 1998 and the introduction of the current funding formula. Because of its nature, the fund has no benchmarks and therefore it has no benchmark costs to update.

Over time, as boards retire their capital debt related to projects approved before 1998, this fund will no longer be needed. I believe that the Ministry of Education should consider using the funds that are "freed up" as boards retire the capital debt serviced under this category of the funding formula for other purposes related to pupil accommodation, such as helping boards address their deferred maintenance and ongoing school renewal needs.

## Special Education

The Special Education Grant provides boards with funding to support the additional programs, services, and equipment required to meet the needs of students who could be or who have been identified as "exceptional pupils." Section 1 of the Education Act defines an "exceptional pupil" as follows: "a pupil whose behavioural, communicational, intellectual, physical or multiple exceptionalities are such that he or she is considered to need placement in a special education program...."

The grant has two components: the Special Education Per Pupil Amount (SEPPA) and the Intensive Support Amount (ISA).

The SEPPA, which is allocated to boards on the basis of total enrolment, recognizes that a certain portion of any student population will include students with special needs ("exceptional pupils") and that there are costs associated with delivering the special programs and services these students need to succeed in school. The ISA is allocated to boards on the basis of their "incidence rate" of students with intense needs who require proportionately costlier services. ISA has four levels: ISA 1 covers the incremental cost of an individual student's equipment needs in excess of $800 in the year of purchase. ISA 2 and 3 cover the cost of providing the intensive staff supports required by students with a very high level of need (usually a small number in any student population). ISA 4 provides funding for education programs provided by boards to students in facilities such as hospitals, children's mental health centres, psychiatric institutions, detention and correctional facilities, community living or group homes, and other social service agencies.

In the 2001–02 school year, the Ministry of Education began a comprehensive review of ISA funding. During this review, boards have been asked to submit claims for funding for students whom the boards believe qualify under ISA 2 and 3 eligibility criteria. Claims are being submitted over an extended period of four cycles between November 2001 and December 2002. During the comprehensive review, the ministry has continued to provide "stable" funding (the same level of ISA 2 and 3 funding that boards were allocated for the 2001–02 school year), but the funding process has yet to "go live" – that is, it does not yet reflect the claims approved during the review.

Many of those who made presentations and submissions to the task force on the Special Education Grant told me that they were initially pleased with the Special Education Grant as it was introduced in 1998 in the student-focused funding formula. The initial allocation ensured that all school boards receive SEPPA and ISA funding and that special education funds are "protected" – boards cannot use these funds for any other purpose. They expressed concerns, however, about the following: the adequacy of the current level of funding, the absence of any mechanism for assessing the effective use of special education resources, the administrative burden associated with ISA claims, and the current focus of boards on generating revenue through the ISA review process (referred to as "diagnosing for dollars"), which some said reinforced negative perceptions of students' potential.

The submission of the Minister's Advisory Council on Special Education (MACSE) maintained that, as a result of the ISA review process and the possibility that boards could generate additional revenue through it, boards are focusing on assessing the needs of students with very high levels of exceptionality (although, the submission says, not always on the special programming needed by these students), but not necessarily on assessing the needs of students with mild to moderate exceptionalities. MACSE also expressed concern about the proportion of the Special Education Grant that goes to the ISA component.

I was also told that the funding formula provides boards with insufficient funding for the transportation of special education students, and that the formula does not recognize the higher costs experienced by French-language, northern, and rural boards in obtaining supports for these students (for example, psychologists and other specialists in the health-care field).

I am making recommendations on a number of issues raised by MACSE, but it made many more comments and suggestions that I am not able to address in this report. I am therefore recommending that the Ministry of Education review and consider the recommendations in MACSE's submission to the task force.

**I recommend that:**

22. the Ministry of Education review and consider the recommendations in the brief submitted to the task force by the Minister's Advisory Council on Special Education

My first recommendations with respect to the Special Education Grant address the issue of funding adequacy. As a start, let me note that I estimate that updating benchmark costs, as recommended earlier in this chapter, will provide an additional $88 million for special education.[31] In addition to the updates, I am recommending that in the 2003–04 school year, following completion of the comprehensive ISA funding review, the ministry "go live" with funding for all approved ISA claims. Based on ministry estimates, I project that the additional annual funding required for all approved claims will be approximately $250 million. I am also recommending that, in the interim, to foster stability in the education sector, the ministry fund in the current school year (2002–03) all claims approved up to the end of cycle 3 (the last cycle completed at the time I wrote this report). I estimate that the current-year funding will cost approximately $130 million of the projected annual $250 million.

I am further recommending that the ministry develop a transportation policy for students with special needs.

As for the higher special education costs experienced by French-language boards, my recommendation 14 asks the Ministry of Education to review all grants to address the higher costs experienced by French-language boards.

**I recommend that:**

23. in the 2003–04 school year, following completion of the comprehensive review of the Intensive Support Amount funding, the Ministry of Education fund school boards for all claims approved during the review

*I estimate that the annual cost of funding all approved Intensive Support Amount claims will be approximately $250 million.*

**I recommend that:**

24. to foster stability in the education sector, the Ministry of Education allocate $130 million to school boards in the current school year (2002–03) to fund all claims approved up to the end of cycle 3 of the comprehensive review of Intensive Support Amount funding
25. the Ministry of Education develop a funding policy for the transportation of students with special needs

Special education stakeholders raised two additional concerns about the adequacy of special education funding, particularly SEPPA, for secondary students.

First, they contend that the per pupil SEPPA allocation for secondary students in the funding formula,[32] which is based on boards' average spending levels in 1997, does not reflect boards' current costs for secondary students with special needs. Stakeholders maintain that the challenges of the new curriculum require boards to provide extra support to many students, and that students with special needs require an even greater level of support. Moreover, the incidence of students in the elementary system with high needs has increased (as documented in data from past ISA reviews), and these students will be moving into the secondary system in the near future.

Second, the new secondary school curriculum, which is four years long instead of five, may reduce the amount of SEPPA funding available to boards, since SEPPA is based on total enrolment, but not the number of students with special needs or the time they spend in secondary school. As a result, boards may have less revenue to meet the needs of secondary school students with special needs, but no reduction in the costs of the programs and services required by these students.

To address this issue, I am recommending that the SEPPA for secondary school students be increased to offset the estimated decline in enrolment that will result from the reduced number of years in the secondary school curriculum, and that it then be increased by a further 10% to support a high level of special education programs and services at the secondary school level.

**I recommend that:**

**26. the Ministry of Education increase the Special Education Per Pupil Amount (SEPPA) for secondary school students to offset the estimated decline in enrolment that will result from the reduced number of years in the secondary school curriculum, and that it then increase the SEPPA by a further 10% to support a high level of special education programs and services at the secondary school level**

*I estimate that the cost of increasing the SEPPA as described in recommendation 26 will be $19 million.*

In presentations and submissions to the task force, I heard many comments about the high administrative burden associated with ISA funding and the requirement that boards submit annual claims that document assessments and diagnoses of students with special needs. Presenters maintained that the ISA claims process, which they say boards use to generate revenue, has diverted boards' attention from the programs and services required by students with special needs. They expressed a desire to turn the focus away from revenue generation and towards the effective use of resources.

I believe that part of the problem is inadequate resources. I note that the Ministry of Education has provided boards with an additional $10 million in 2002–03 for ISA assessments. I also note that the ministry and school boards have almost completed the ISA review. Nonetheless, I urge the ministry, in consultation with the ISA Working Group,[33] to develop an approach to funding that, starting in the 2003–04 school year, will significantly reduce boards' administrative burden related to the ISA claims process. As part of this effort, in the future, boards should be required to assess only new students with special needs (that is, students who have never been assessed by any board) and students whose needs have changed.

Ministry policy, and the overall goal of those who work with students with special needs, is to have boards develop Individual Education Plans (IEPs) for these students that focus on their needs and strengths, rather than their exceptionalities, and then to implement and monitor these plans, adjusting them as necessary. However, special education stakeholders raised concerns about the effectiveness of the programs and services provided to students with special needs in enhancing these students' achievement levels. In his 2001 Annual Report, the Provincial Auditor noted that the Ministry of Education does not have the information or a process to determine whether the special education programs and services it funds are being delivered effectively and efficiently and whether they are meeting their objectives.[34]

I believe that school boards should be held accountable for meeting the needs of these students and for delivering the programs, services, and accommodations set out in the students' IEPs. I understand that the ministry has engaged stakeholders over the past two years in a standard-setting process that is attempting to define appropriate special education programs and services. MACSE noted in its submission to the task force, and I concur, that final approval of these standards and their release would go a long way towards helping boards define the core special education programs and services they should be providing.

**I recommend that:**

**27. the Ministry of Education, following a brief period of consultation on its "Proposed Standards for Special Education Programs and Services Common to All Exceptionalities," publish an approved set of standards and, if necessary, adjust the funding formula to provide school boards with funding to implement the new standards**

MACSE, in its submission to the task force, recommended that, as part of an accountability framework, the ministry fund applied research aimed at helping boards build the capacity to develop effective and cost-efficient plans and programming for students with special needs and appropriate ways to measure whether these plans and programs are improving the achievement levels of students with special needs. I support this recommendation and urge the ministry to consider it along with the other recommendations in the MACSE submission to the task force (see recommendation 22).

## Student Transportation

As part of my mandate, I was asked to address funding issues related to transportation. The existing transportation allocation formula has been carried over from the old funding formula – the one that preceded student-focused funding. It was not revised when the new funding formula was introduced in 1998. In the spring of 1998, the Ministry of Education established a Transportation Funding Review Committee that includes stakeholders to recommend a new approach to funding student transportation. Considerable effort has been invested since then in the development of a needs-based model.

In recognition of increased fuel costs and as a transition measure until the new transportation formula is in place, the ministry added $23 million to the base Transportation Grant allocation in 2001–02 as well as $6.3 million in transition funding related to the transportation costs of boards experiencing declining enrolment. The government's 2002 budget announced an additional $20 million annually for the Transportation Grant, but this money has not yet been included in boards' allocations for the current year.

I heard the following concerns about the current Transportation Grant:

- It does not reflect all of the increases in the cost of fuel and significant increases in the cost of school buses, school bus operators, licensing, inspections, insurance, vehicle maintenance, and safety. It also lacks a review mechanism for dealing with rising costs.
- There are no province-wide transportation guidelines on common walking distances or maximum ride times, especially for students in Junior Kindergarten to Grade 3.
- It does not address boards' increasing concerns about safety issues and the need for transportation safety programs.
- It does not specifically take into account costs related to the transportation of students with special needs.
- It does not promote or reward the co-operative efforts of boards that have formed regional transportation consortia.
- By using pre-1998 board expenditures as the basis for the existing allocation, the grant perpetuates historical inequities because it does not recognize that some boards had relatively low expenditure levels in the pre-1998 period because they had implemented cost-saving measures.

I heard considerable support for the immediate implementation of a needs-based funding formula – that is, one that takes into account student needs instead of the existing historical allocation – and I agree that the issue is urgent. I am recommending that the Ministry of Education build on the extensive work already done by the Transportation Funding Review Committee and complete the development of a needs-based Transportation Grant as quickly as possible. The ministry also needs to address the transportation costs associated with special education needs, as noted in recommendation 25, and with safety programs.

**I recommend that:**

28. the Ministry of Education complete the development of a Transportation Grant that is based on need, that includes a mechanism for annual reviews and updates of school boards' student transportation costs, and that recognizes the costs associated with the transportation of students with special needs and the implementation of transportation safety programs

I estimate that the general updating of costs recommended earlier in this chapter will result in an additional $80 million for the Transportation Grant,[35] on top of the $23 million added in 2001–02. Because boards have particularly urgent cost pressures related to student transportation, and to foster stability in the education sector, I am recommending that the $20 million in additional funding announced in the government's 2002 budget and referred to above be allocated to boards in the current school year 2002–03.

**I recommend that:**

29. to foster stability in the education sector, the Ministry of Education allocate the $20 million increase in funding for school transportation that was announced in the government's 2002 budget to school boards in the current school year (2002–03), and that it direct these funds to those boards that are most in need to help them address transportation cost pressures

I am impressed with the many co-operative transportation arrangements school boards have developed over the past few years. Regional consortia and other co-operative measures demonstrate a high level of cost-effectiveness in the spending of education funds. I believe that school boards and the Ministry of Education should work together to develop a province-wide system of regional transportation consortia.

A concept that was presented in a submission to the task force and that I find particularly interesting is the establishment of 8 to 10 transportation "regions" in the province with a "service board" in each one. The service board would be responsible for purchasing services from transportation vendors. While school boards in a designated region would be encouraged to form consortia to achieve cost benefits, individual boards could choose not to belong to these consortia. However, they would be required to purchase transportation services from vendors through the consortia. They would also be expected to contribute to the development of their regional consortium's policies. The service boards would be funded by the participating boards. This approach offers the potential for a consistent standard of transportation services that is appropriate to the region (such as guidelines on walking distances and ride times), efficiency of operations, and a substantial level of cost-effectiveness.

**I recommend that:**

30. the Ministry of Education consult school boards and other appropriate stakeholders to facilitate a move towards the implementation of a "regional service boards" approach to the delivery of student transportation

The regional service boards model can also be applied to other board business functions such as purchasing. Some boards have already set up purchasing consortia similar to this model. In fact, it is evident that boards have engaged in a considerable amount of co-operation in sharing best practices and participating in consortia aimed at securing goods and services in a cost-effective manner. I encourage them to continue to pursue co-operative ventures. In a very positive step, the ministry recently established a co-operative services website for business personnel in the boards. To date, the website is providing partnership information, examples of innovative business practices, and an "e-conferencing" facility for boards' business personnel.

## Teachers' Qualifications and Experience

The concerns expressed to me during my consultations about the Teacher Qualifications and Experience Grant focused on three issues: inadequate funding, the current average secondary school student credit load recognized by the funding formula, and boards' problems recruiting and retaining teachers.

The main purpose of the Teacher Qualifications and Experience Grant is to address the high teacher salary costs faced by those boards that have a large proportion of highly qualified and experienced teachers. (Boards around the province have different proportions of teachers with high levels of qualifications and experience.) With respect to this issue, I estimate that the updates to benchmark costs recommended early in this chapter will increase the Teacher Qualifications and Experience Grant by $30 million.[36]

The grant also contains an allocation that recognizes that boards require more teachers when students take higher than average credit loads. The Foundation Grant provides funding for the number of secondary school teachers required when students take an average of 7.2 credits, which was the actual average secondary student credit load in 1997. The Teacher Qualifications and Experience Grant provides boards with additional funding where a board's average secondary school credit load exceeds 7.2 credits up to a maximum of a board-wide average of 7.5 credits.

Under the new secondary school curriculum, students are expected to graduate with a required 30 credits in four years. The 30-credit requirement is a minimum; students may take additional credits, and boards have been reporting gradually increasing average credit loads. For the current school year (2002–03), over 50 boards are reporting average credit loads of greater than 7.5. Adjusting the maximum board-wide average recognized by this grant would acknowledge the higher costs associated with employing additional teachers when students take higher than average credit loads in line with the expectations of the new curriculum.

I am therefore recommending that the Ministry of Education review the credit-load factor and make an appropriate adjustment to the funding formula.

**I recommend that:**

**31. the Ministry of Education adjust the credit-load factor in the funding formula in light of the new secondary school curriculum**

With respect to the recruitment and retention of teachers, it is apparent that the teaching profession is undergoing considerable change. An increasing number of teachers are retiring, reflecting the general trend of an aging Ontario workforce. Boards face a challenge in recruiting and retaining good teachers, because starting salaries for new teachers are lower than starting salaries in other professions that require similar skills.

In view of this situation, I urge the Ministry of Education to consider adjusting the benchmark factors of the instructional salary matrix that is used to calculate the Teacher Qualifications and Experience Grant.

## Technology

The benchmarks in the Foundation Grant include three categories related to the costs associated with the classroom use of information and communications technology (ICT):

- "textbooks and learning materials": includes instructional software, CD-ROMs, Internet expenses, and technology that supports distance education; associated benchmark cost, $75 per elementary pupil and $100 per secondary pupil
- "classroom computers": includes hardware and associated network costs; associated benchmark cost, $43 per elementary pupil and $56 per secondary pupil
- "professional/para-professional services": includes staff who provide support services to students and teachers; including computer technicians; associated benchmark cost, $67 per elementary pupil and $105 per secondary pupil

As I have noted before, the benchmark costs are based on boards' actual costs in 1997. Many of those who made presentations and submissions to the task force pointed out that both the need for ICT in elementary and secondary education and advancements in ICT have increased dramatically since 1997. ICT is now an integral part of the curriculum and a key component in students' ability to achieve success in school.

In acknowledgement of the new and important role of ICT in education, the Ministry of Education and the Ministry of Training, Colleges and Universities created the Ontario Knowledge Network for Learning (OKNL) in the spring of 2000. The OKNL was intended to oversee the development of a vision and plan of action for integrating education and ICT in Ontario. The OKNL has issued reports proposing a direction, but to date the government has taken little action on the OKNL's recommendations. The education community needs direction from the government on the future role it envisages for ICT in the classroom. I therefore urge the ministry to respond to the reports of the OKNL.

I also heard concerns that the funding formula does not pay sufficient attention to the concept of "total cost of ownership" in relation to ICT. "Total cost of ownership," I was told, goes beyond the cost of specific hardware and software; it recognizes a host of factors that are necessary ingredients in the development of successful ICT strategies. For example, presenters suggested that there is a need for funding to train teachers in the effective use of ICT in teaching the curriculum and to hire the technical staff needed to support ICT initiatives.[37]

At present, the School Board Administration and Governance Grant covers the ICT needs of school board administrators, such as enrolment reports; business, finance, and human resources functions; and the management of physical facilities. Presenters identified the application of ICT to administrative functions as another area that both requires new investments and offers significant opportunities for the effective and efficient management of board resources.[38]

I support the calls for improvement of ICT systems in the classroom and in board administration. This issue offers the Ministry of Education an opportunity to promote the standardization of classroom ICT systems and to promote the effective and efficient management of board resources.

**I recommend that:**

**32. the Ministry of Education promote standardization, where appropriate, of instructional software and classroom information and communications technology (ICT) systems, and that it work with school boards to promote the effective and efficient management of boards' administrative ICT systems**

I wish to note that, while I acknowledge the importance of computers in the classroom and the need to train teachers in their use, I also believe that teaching methodology needs to adapt to truly integrate ICT into instruction and to use ICT in instruction to its fullest advantage.

## Governance

In Chapter 3, I set out my views of the roles and responsibilities of the major partners in education. In keeping with those views and in light of the introduction of the student-focused funding formula and the loss of taxing authority by school boards, I believe that there is a need for a thorough review of education governance.

During the course of my review I observed that the introduction of the student-focused funding formula has affected the relationships among the provincial government, school boards, teachers, school councils, and community groups. These relationships need to be clarified. To my mind, the question is whether the governing structure is as effective as it should be to advance the goal of continuous improvement in student learning and achievement. To address this goal, the roles and responsibilities of all partners in education need to be more clearly articulated so that each partner and the public understand them.

I am therefore recommending that the Minister of Education review, in consultation with all education partners, the education governance structure and the roles and responsibilities of each of the partners.

**I recommend that:**

33. the Minister of Education review, in consultation with all education partners, the education governance structure and the roles and responsibilities of each of the partners

# 5. List of Recommendations and Summary of Estimated Costs

## List of Recommendations

In introducing this list of recommendations, I wish to reiterate a point I made at the beginning of Chapter 4. With the exception of recommendations 2, 24, and 29, my recommendations are for measures that, if implemented, would begin to take effect in the 2003–04 school year as part of a multi-year funding plan. By "multi-year funding plan," I mean over three years. The government may wish to fully implement some measures earlier.

Recommendations 2, 24, and 29 are for, respectively, funding for collective bargaining with teaching and support staff, funding under the Special Education Grant for Intensive Support Amount (ISA) claims that have been approved up to the end of cycle 3 of the ministry's comprehensive review of ISA funding, and funding for boards' most pressing needs related to student transportation.

These three recommendations reflect the priorities that I discerned through my consultations and subsequent analysis of the issues. I believe that if these recommendations are implemented in the 2002–03 school year they will foster stability in the education sector.

**I recommend that:**

1. the Ministry of Education update the benchmark costs for all components of the funding formula (the Foundation Grant, the Special Purpose Grants, and the Pupil Accommodation Grant) to reflect costs through August 2003, and that funding that reflects these updated benchmark costs be phased in over three years, starting in 2003–04, as part of a multi-year funding plan

   *I estimate that the updated benchmark costs covering costs through August 2003 will total $1.08 billion, excluding the additional cost of updating salaries and benefits in 2002–03 (see recommendation 2). The $1.08 billion estimate comprises updates of benchmark costs to August 2002 ($1.01 billion) plus updates of non-salary-and-benefit costs to 2003 ($70 million). The estimated $1.08 billion should be phased in over three years, starting in 2003–04, as part of a multi-year funding plan.*

2. to foster stability in the education sector, the Ministry of Education allocate funds to school boards in the current school year (2002–03) for the current round of collective bargaining with teaching and support staff

3. the Ministry of Education, in consultation with school boards and other members of the education community, develop mechanisms for annually reviewing and updating benchmarks in the funding formula and for conducting a more comprehensive overall review of the funding formula every five years

4. the Ministry of Education, in consultation with school boards, other members of the education community, and other appropriate stakeholders, review and consider grouping all of the Special Purpose Grants in the funding formula that have a focus on readiness to learn for preschool children, in-school students, and youth making the transition from school to work/postsecondary education, with the goal of ensuring that these Special Purpose Grants are designed to meet the needs of at-risk children and youth effectively

5. the Ministry of Education determine the appropriate funding magnitude of the Demographic Component of the Learning Opportunities Grant by collecting and analysing data on programs and services for students at risk from a representative sample of school boards that offer effective programs and services of this nature

6. as an interim measure, pending the collection and analysis of the data on programs and services for students at risk described in recommendation 5, the Ministry of Education invest an additional $50 million in the Demographic Component of the Learning Opportunities Grant, using the current allocation model based on the 1996 census

7. the Ministry of Education review the current allocation models for the Demographic Component of the Learning Opportunities Grant to ensure that the distribution of funds to school boards under this grant is fair and equitable, and further, that the ministry update the socio-economic factors in the formula using 2001 census data

8. beginning in 2003–04, the Ministry of Education reallocate the unused portion of the Grades 7 to 10 Component of the Learning Opportunities Grant (LOG) to the LOG for programs and services for students who need remedial literacy and math programs, and further, that the ministry require school boards, as part of their accountability, to report on how the funds have been used for this purpose

9. the Ministry of Education require school boards that receive funds through the Learning Opportunities Grant to report publicly on how the expenditure of these funds is contributing to continuous improvement in student achievement and to the reduction of the performance gap between high and low achievers in their schools while maintaining high standards

10. the Ministry of Education increase the funds allocated under the Language Grant to reflect five years of language training for English as a Second Language/English Skills Development and for *Perfectionnement du français*

*I estimate that the increase to the Language Grant for English as a Second Language/English Skills Development and* Perfectionnement du français *to reflect five years of language training will cost $65 million.*

11. the Ministry of Education obtain accurate data to establish the extent of school boards' needs related to the provincial role in the education of Aboriginal students and, on the basis of this data, implement a new grant targeted at the educational needs of Aboriginal students who are not living on reserves, and further, that the ministry require boards that are eligible for this grant to spend it on programs and services for Aboriginal students and to publicly account both for the expenditures and the results achieved

12. the Province work with Aboriginal leaders and the federal government to ensure that there is an integrated approach to and adequate funding for the education of Aboriginal students

13. the government establish a Cabinet-level advisory council on integrated services for children and families, composed of representatives from the Ministries of Community, Family, and Children's Services, Education, Health and Long-Term Care, Public Safety and Security, and Tourism and Recreation, to meet on a regular basis to align the work and the funding mechanisms of the ministries that serve families, children, and youth

14. the Ministry of Education review the brief submitted to the task force by the 12 French-language school boards, together with the Association des conseillères et des conseillers des écoles publiques de l'Ontario and the Association franco-ontarienne des conseils scolaires catholiques, and amend the funding formula as appropriate to ensure that each of the grants in the formula recognizes the higher costs experienced by French-language boards in delivering education programs and services

15. the Ministry of Education allocate core-support funding through the Geographic Circumstances Grant to school boards that have decided to keep open a small school in a single-school community and that, under the updated Foundation and Special Purpose Grants (that is, updated as described in recommendation 1), do not have an average school size that is sufficient to generate funding for core-support staff for that small school, and further, that the core-support funding cover the following:
    - a full-time principal and secretary for each elementary and secondary school
    - a full-time support staff person for each elementary and secondary school to ensure a safe, clean, and well-maintained school, and
    - a full-time individual in a secondary school to provide advice on careers and postsecondary education to secondary school students and advice to Grade 8 students on secondary school placements

    *I estimate that core-support funding for small schools in single-school communities will cost $50 million.*

16. the Ministry of Education extend the duration of the Declining Enrolment Adjustment to three years

    *I estimate that extending the duration of the Declining Enrolment Adjustment will cost $5 million.*

17. the Ministry of Education reconstitute the Local Priorities Amount as 5% of the Basic Amount of school boards' Foundation Grants (updated as per recommendations 1 and 2), and that boards apply the Local Priorities Amount to locally established priorities, programs, and services aimed at the continuous improvement of student learning and achievement

18. the Ministry of Education require school boards, through their directors of education, to consult with principals and school councils for the purposes of developing a plan for the use of the Local Priorities Amount, and to annually review the plans and report publicly to all stakeholders and to the ministry on the results achieved through the implementation of the plans, in individual schools and in the district as a whole

19. the Ministry of Education make a new strategic investment of $50 million in the School Renewal Allocation for school boards to use to address their most pressing school renewal needs

20. the Ministry of Education allocate a new strategic investment of $200 million annually to a "deferred maintenance amortization fund," which would fund the principal and interest costs of school boards' payments to service the debts boards would incur in borrowing funds so that they could begin to address their deferred maintenance needs

21. the Ministry of Education review the benchmark costs in the New Pupil Places Allocation with a view to distinguishing between benchmark costs for construction that is under way or has been completed and benchmark costs for construction that is projected, and that it update and review, as described in recommendations 1 and 3, only the benchmark costs for construction that is projected

22. the Ministry of Education review and consider the recommendations in the brief submitted to the task force by the Minister's Advisory Council on Special Education

23. in the 2003–04 school year, following completion of the comprehensive review of the Intensive Support Amount funding, the Ministry of Education fund school boards for all claims approved during the review

    *I estimate that the annual cost of funding all approved Intensive Support Amount claims will be approximately $250 million.*

24. to foster stability in the education sector, the Ministry of Education allocate $130 million to school boards in the current school year (2002–03) to fund all claims approved up to the end of cycle 3 of the comprehensive review of Intensive Support Amount funding

25. the Ministry of Education develop a funding policy for the transportation of students with special needs

26. the Ministry of Education increase the Special Education Per Pupil Amount (SEPPA) for secondary school students to offset the estimated decline in enrolment that will result from the reduced number of years in the secondary school curriculum, and that it then increase the SEPPA by a further 10% to support a high level of special education programs and services at the secondary school level

    *I estimate that the cost of increasing the SEPPA as described in recommendation 26 will be $19 million.*

27. the Ministry of Education, following a brief period of consultation on its "Proposed Standards for Special Education Programs and Services Common to All Exceptionalities," publish an approved set of standards and, if necessary, adjust the funding formula to provide school boards with funding to implement the new standards

28. the Ministry of Education complete the development of a Transportation Grant that is based on need, that includes a mechanism for annual reviews and updates of school boards' student transportation costs, and that recognizes the costs associated with the transportation of students with special needs and the implementation of transportation safety programs

29. to foster stability in the education sector, the Ministry of Education allocate the $20 million increase in funding for school transportation that was announced in the government's 2002 budget to school boards in the current school year (2002–03), and that it direct these funds to those boards that are most in need to help them address transportation cost pressures

30. the Ministry of Education consult school boards and other appropriate stakeholders to facilitate a move towards the implementation of a "regional service boards" approach to the delivery of student transportation

31. the Ministry of Education adjust the credit-load factor in the funding formula in light of the new secondary school curriculum

32. the Ministry of Education promote standardization, where appropriate, of instructional software and classroom information and communications technology (ICT) systems, and that it work with school boards to promote the effective and efficient management of boards' administrative ICT systems

33. the Minister of Education review, in consultation with all education partners, the education governance structure and the roles and responsibilities of each of the partners

## Summary of Estimated Costs

The estimated total cost of my recommendations, as far as I am able to calculate it, is $1.769 billion. This estimate does not include all the costs that may result from my recommendations, for two reasons:

- I am unable to estimate the teaching and support staff salary and benefits costs being negotiated during the current school year (2002–03). These salary and benefits costs will not be known, of course, until the current round of collective bargaining is complete. When they are known, they will have to be added to my estimated total.

- Some of my recommendations ask the Ministry of Education to collect and analyse data and to analyse aspects of the funding formula to ensure that the benchmark factors and costs in the formula are appropriate. If the formula is adjusted as a result, additional costs may be involved.

The table below summarizes the estimated costs of my recommendations. For more detail on my approach to updating the benchmark costs and for more detailed calculations, see Appendices H, I, and J.

**Summary of Estimated Costs of the Education Equality Task Force's Recommendations**

| Item | Cost (Millions) |
|---|---|
| Update of all benchmark costs to August 2002 | $1,010 |
| Update of all benchmark costs from August 2002 to August 2003, *not including* the cost of salaries and benefits being negotiated in 2002–03 | 70 |
| New investments | 689 |
| **Total estimated cost of recommendations, *not including* the cost of salaries and benefits being negotiated in 2002–03** | **$1,769** |

*Source:* Appendix I, Table I.1.

# Notes

*Note:* The universal resource locators (URLs) for electronic texts that are cited below were accessed during the course of the task force's research, between May and November 2002. Some or all of these electronic texts may be inaccessible after publication of this report, or they may no longer be available at the URLs shown. The task force takes no responsibility for their accessibility.

1. Ontario, Ministry of Education, "Student-Focused Funding: Parents Guide 2002–03" (2002), <http://www.edu.gov.on.ca/eng/funding/eguide02.pdf>, and Ministry of Education staff.
2. Ontario, Ministry of Education, "Student-Focused Funding: Parents Guide 2002–03," op. cit., 1.
3. Increases to the student-focused funding formula since its inception are described in Appendix H, note 3.
4. Ontario, Ministry of Education, "Student-Focused Funding: Parents Guide 2002–03," op. cit., and Ontario, Ministry of Education, "Student-Focused Funding: Technical Paper 2002–03" (2002), <http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>.
5. For example, Michael Barber, "High Expectations and Standards for All, No Matter What: The Leadership Challenge for a World Class Education Service" (2002), <http://www.ncsl.org.uk/index.cfm?pageid=ev_auth_barber>; Michael Fullan, *Change Forces with a Vengeance* (London: RoutledgeFalmer, 2002); and Charles Ungerleider in a book about the future of Canadian public schooling, to be published in Canada by McClelland and Stewart in 2003.
6. Britain and other jurisdictions came to this realization. See Michael Barber, "High Expectations and Standards for All, No Matter What: The Leadership Challenge for a World Class Education Service," op. cit.
7. In a conversation I had with him, Dr. Charles Ungerleider referred to the optimum benefit as "productive efficiency."
8. Richard F. Elmore, *Bridging the Gap Between Standards and Achievement: The Imperative for Professional Development in Education* (Washington, D.C.: Albert Shanker Institute, 2002), 5.
9. The exception is the Transportation Grant, which is based on an allocation in the old, pre-1998 funding formula. Nonetheless, the costs involved in providing student transportation can be measured and the grant can be adjusted to reflect actual cost. Therefore, when I refer to "updating the benchmark costs of all components of the funding formula," I am including the costs involved in providing student transportation.
10. Michael Fullan, *Change Forces with a Vengeance* (London: RoutledgeFalmer, 2002), 18.
11. For example, Margaret Norrie McCain and J. Fraser Mustard, *The Early Years Study, Three Years Later: From Early Child Development to Human Development: Enabling Communities* (Toronto: The Founders' Network, 2002). See also the works cited in Expert Panel on the Learning Opportunities Grant (Ontario), *Learning Opportunities Grant – Panel Report to Minister of Education and Training* (Toronto: Ontario Ministry of Education and Training, 1997), 4.
12. Margaret Norrie McCain and J. Fraser Mustard, *The Early Years Study, Three Years Later: From Early Child Development to Human Development: Enabling Communities*, op. cit.
13. Quoted by David Crane in "By failing children, we fail ourselves," *Toronto Star* (October 20, 2002).
14. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
15. Expert Panel on the Learning Opportunities Grant (Ontario), *Learning Opportunities Grant – Panel Report to Minister of Education and Training* (Toronto: Ontario Ministry of Education and Training, 1997), 9.
16. The allocation for ALF does not take into account three years of data; rather, it is a calculation based on three factors: basic level of service, an "assimilation" factor, and cost per instructional unit. For more information on both ESL/ESD and ALF/PDF, consult Ontario, Ministry of Education, "Student-Focused Funding: Technical Paper 2002–03" (2002), <http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>, 18–22.

17. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.

18. See Ontario, Ministry of Education, "Student-Focused Funding: Technical Paper 2002–03" (2002), <http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>, 18–22.

19. Canada, Royal Commission on Aboriginal Peoples, "Education," chap. 5 in *Gathering Strength*, vol. 3 of *Report of the Royal Commission on Aboriginal Peoples* (Ottawa: the Commission, 1996), 433–34.

20. Expert Panel on the Learning Opportunities Grant (Ontario), *Learning Opportunities Grant – Panel Report to Minister of Education and Training* (Toronto: Ontario Ministry of Education and Training, 1997), 6.

21. Because French-language school boards operate in areas where the majority of the population is English-speaking, they struggle constantly against the assimilation of their students into the English-language culture.

22. For the funding formula's definitions of a small elementary and a small secondary school, see Ontario, Ministry of Education, "Student-Focused Funding: Technical Paper 2002–03" (2002), <http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>, 25 (the "Geographic Circumstances Grant").

    Pages 7–8 of the document ("Foundation Grant") describe the calculation used to determine the core resources for a school. It shows that the funding formula makes provision for 2.75 principals for every 1,000 elementary students. Thus, to be able to fund one principal, an elementary school must have at least 364 students (1,000 / 2.75). Current information indicates that the average elementary school size is 340 students, and that over 60% of existing elementary schools have fewer than 364 students.

    For secondary schools, the formula provides for 1.1 principals for every 1,000 secondary students, which means that a minimum of 909 pupils (1,000 / 1.1) is needed to obtain funding for one principal. Current information indicates that the average secondary school size is 847 students, and that over 55% of existing secondary schools have fewer than 909 students.

23. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.

24. The Ministry of Education's technical document on the Pupil Accommodation Grant notes that "In 1998, detailed information on each school in Ontario was compiled through the School Facilities Inventory System and used to determine the capacity of each board's elementary and secondary schools on a consistent basis across the province." This "rated" capacity can be adjusted in certain circumstances, such as when a board sells a school. In 2001–02 the formula was changed to allow boards that would not normally qualify for new pupil places to be eligible to receive funding to address "significant and persistent enrolment pressures at specific schools." Ontario, Ministry of Education, "Student-Focused Funding: Pupil Accommodation Grants 2002-2003" (2002), <http://www.edu.gov.on.ca/eng/funding/e0203pupilacc.pdf>, 3–5.

25. The limits on boards' spending flexibility are described in Chapter 2 of this report.

26. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.

27. Examples include the Society for College and University Planning, the American Public Works Association, and the Canadian Association of University Business Officers. See also Toronto District School Board, *Facility Review and Assessment, Executive Summary* (Toronto: the Board, 2002), which contains information about cyclical renewal costs.

28. The $266 million figure was arrived at as follows: The original allocation for the 2002–03 year was $241 million. In its May 2002 budget, the government announced an additional $25 million for school renewal, which the Ministry of Education has now added to the $241 million, for a total of $266 million.

29. The ministry's initiative to assess school renewal needs will generate sufficient information to calculate a Facilities Condition Index (FCI) for each school, each board, and the public education system as a whole. An FCI is the estimated maintenance renewal costs divided by the capital replacement value of a school. For example, if a school's replacement value is $10 million and it has an estimated maintenance renewal cost of $1.5 million, the FCI would be 0.15.

30. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.

31. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.

32. The Special Education Per Pupil Allocation is provided on the basis of a sliding scale, with lower levels for secondary school students. For more information, see Ontario, Ministry of Education, "Student-Focused Funding: Technical Paper 2002–03" (2002), <http://www.edu.gov.on.ca/eng/ funding/ e0203tech.pdf>, 13.

33. The ISA Working Group was established by the ministry. It comprises representatives of the Minister's Advisory Council on Special Education, trustee associations, supervisory officer associations, senior business officials, and parent groups.

34. Ontario, Office of the Provincial Auditor of Ontario, "2001 Annual Report" (2001) <http://www.gov.on.ca/ opa/English/ro1t.htm>, 126–27.

35. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.

36. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.

37. The website of the U.S.-based Consortium for School Networking (CoSN), <http://www.cosn.org>, offers information on a variety of topics related to information and communications technology, including the concept of total cost of ownership.

38. The 2002 Ontario Provincial Budget committed $17 million over two years to the assessment of school renewal needs (the initiative referred to earlier in this chapter and in note 29, above). These funds will be used for, among other things, the acquisition of standard asset management software for each board.

# Appendix A: Task Force Chair and Expert Advisers

## Head of the Education Equality Task Force

**Dr. Mordechai Rozanski** has been president of the University of Guelph since 1993. He is its longest serving president and a professor in the department of history. Dr. Rozanski is also chair of the Council of Ontario Universities. He holds a bachelor of arts in history from McGill University and a doctorate in Chinese history from the University of Pennsylvania. As well, Dr. Rozanski has been a Canada Council Fellow at New Asia College in Hong Kong, a Lily Fellow at Stanford University, and an American Historical Association Fellow at Columbia University.

## Expert Advisers

**Lynn Beyak** is a small business owner from northwestern Ontario. Active in education since 1982, she is a former chair of the Ontario Parent Council, trustee and vice-chair of the Fort Frances Rainy River Board of Education, delegate for the West Rainy River District Home and School Association, and parent volunteer. She is an ambassador for Ontario's Promise for Children and Youth and an active community volunteer. Ms. Beyak retired as a trustee in 1997.

**Brian Cain,** a certified management accountant and school business official for 32 years, served as the superintendent of business for the former Grey and Durham Boards of Education and as executive officer of business services for the North York Board of Education and the Toronto District School Board. Mr. Cain retired in 2001.

**Mariette Carrier-Fraser** served in Ontario's education system for more than 36 years. She taught school in both northern and southern Ontario communities, became principal of a French-language school, and then joined the Ministry of Education as a regional superintendent for French-language schools. In her provincial government career, Ms. Carrier-Fraser was assistant deputy minister for French-language education in both the Ministry of Education and the Ministry of Colleges and Universities, and assistant deputy minister of elementary, secondary, and postsecondary operations and of French-language education in the Ministry of Education. She retired in 1997.

**Patrick Slack** held a variety of positions during 42 years in the Ontario education system. He served as a teacher, vice-principal, and principal at both the elementary and secondary levels. He was also superintendent of the Frontenac-Lennox and Addington Roman Catholic Separate School Board and executive director of the Ontario Catholic School Trustees' Association. Mr. Slack has also served with the Ontario Teachers' Federation, the Leeds and Grenville Board of Education, the Eastern Ontario Secondary School Principals' Council, and the provincial committee for new Catholic supervisory officers. He retired in 2001.

**Ann Vanstone** was a trustee and chair of both the Toronto Board of Education and the Metropolitan Toronto School Board. During that time, she was also a member of the Working Group on Education Finance Reform. In 1997, she retired from the Metro board and was appointed co-chair of the Education Improvement Commission, which oversaw the amalgamation of Ontario's English-language school boards and the establishment of the French-language school board system in the province. In 2001, Ms. Vanstone served as co-chair of the Task Force on Effective Schools.

# Appendix B: Stakeholder Advisory Committee

| Organization | Representative |
|---|---|
| Association des agentes et agents de supervision franco-ontariens | Roland Montpellier |
| Association des conseillères et des conseillers des écoles publiques de l'Ontario | Yvon Ferrand |
| Association des directions et des directions adjointes des écoles franco-ontariennes | Serge Plouffe |
| Association des enseignantes et des enseignants franco-ontariens | Bernard Éthier |
| Association franco-ontarienne des conseils scolaires catholiques | Robert Gagné |
| Canadian Union of Public Employees – Ontario Region | Linda Jewett |
| Catholic Principals' Council of Ontario | Nelly Kelders |
| Conseil ontarien des directrices et des directeurs de l'éducation de langue française | Marc Dionne |
| Council of Ontario Directors of Education | Michel Serré |
| Council of Senior Business Officials | John Sabo |
| Elementary Teachers' Federation of Ontario | Barbara Richter |
| Fédération de la jeunesse franco-ontarienne | Noémi Paquette |
| Minister's Advisory Council on Special Education | Lynn Ziraldo |
| Ontario Association of Parents in Catholic Education | Mary Ann Cuderman |
| Ontario Association of School Business Officials | Don Higgins |
| Ontario Catholic School Business Officials' Association | David Visser |
| Ontario Catholic School Trustees' Association | Pat Daly |
| Ontario Catholic Student Council Federation | John-Paul Rodrigues |
| Ontario Catholic Supervisory Officers' Association | Roger Lawyer |
| Ontario English Catholic Teachers' Association | Donna Marie Kennedy |
| Ontario Federation of Home and School Associations | Lesley Schuurs |
| Ontario Parent Council | Irene Murray |
| Ontario Principals' Council | Helen Spence |
| Ontario Public School Boards' Association | Gerri Gershon |
| Ontario Public Supervisory Officials' Association | Wayne McNally |
| Ontario Secondary School Students' Association | Kara Lilly |
| Ontario Secondary School Teachers' Federation | Dale Leckie |
| Ontario Student Trustees' Association – Association des élèves conseillères et conseillers de l'Ontario | William Wong |

| Organization | Representative |
|---|---|
| Ontario Teachers' Federation | Susan Langley |
| Parents partenaires en éducation | Ghislaine Pilon |
| People for Education | Annie Kidder |

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| Association des enseignantes et des enseignants franco-ontariens | Bernard Éthier |
| Association franco-ontarienne des conseils scolaires catholiques | Robert Gagné |
| Canadian Union of Public Employees – Ontario Region | Linda Jewett |
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| Organization | Representative |
|---|---|
| Ontario Teachers' Federation | Susan Langley |
| **Parents partenaires en éducation** | **Ghislaine Pilon** |
| People for Education | Annie Kidder |

# Appendix C: Discussion Points to Frame the Research and Consultation Process

*The following information was contained in a discussion paper posted on the task force website and distributed to members of the Stakeholders Advisory Committee and other participants in the consultation process.*

In determining whether the current funding approach meets its original objectives, the task force will consider questions that relate to the achievement of these five principles. The questions raised in this guide are designed to prompt discussion. However, discussion does not need to be limited to these questions; nor need the recommendations only reflect the answers to these questions. Your input is needed to develop effective and practical recommendations. All aspects of the funding formula are open to discussion.

## Quality of Student Learning and Achievement

The review of the student-focused approach to education funding recognizes that the funding formula is not an end in itself. The purpose of the funding formula is to serve as an instrument to ensure that all Ontario's schools have the appropriate resources to advance the highest quality of student learning and achievement. In this regard, the student-focused funding mechanism should reflect relevance, stability, and efficiency in the structure of cost benchmarks.

The Education Equality Task Force is considering questions such as:

- What core programs and services are essential to your definition of a quality education?
- How effective is the current funding approach in providing appropriate and stable support to these programs and services, including personnel costs, transportation, English as a second language, special education, and continuing education, among others? In other words, does per pupil funding reflect the cost of per pupil programs and services needed to achieve a quality educational experience?
- Should boards have some access to local revenue, in an equitable fashion, to deal with discretionary programs and services beyond the education programs and services covered by student-focused funding?

## Equity and Fairness

One of the key objectives of student-focused funding is to ensure that all students have access to a quality education. Some of the questions that arise are:

- How effective is the funding mechanism in responding to different needs of students and different needs of school boards in urban, northern, and rural areas; among small and large urban boards; and among public, Catholic, French-, and English-language school boards?
- Are there differences among school board costs that require funding to be more responsive?

## Responsiveness to Local Needs

As indicated in the discussion of equity and fairness above, there is a great diversity in Ontario that affects learning opportunities and costs. A system that responds to local needs and preferences will encourage local participation and accountability. Areas of focus include:

### Student Transportation

The Transportation Grant model predates the benchmark-based funding formula. The Ministry of Education has been working with school boards and transportation providers to revise the transportation component of the funding formula.

- What elements should be included in a new model?
- Would incentives be appropriate and effective to encourage boards to form partnerships to deliver transportation services?

**Special Education**

These needs vary from student to student and board to board. Individual boards therefore offer a range of programs to meet student needs. To improve the match between board funding and student needs, the government has undertaken a review of Intensive Support Amount funding to inform decisions about the Special Education Grant for 2003–04. In this regard:

- How should the government assess boards' needs for funding to support special education programs and services?
- How can funding be distributed in a way that is both responsive to students' needs for services and administratively efficient?
- What approach to special education funding would be effective in balancing demonstrated need and efficiency?

**School Renewal**

The Pupil Accommodation Grant includes a School Renewal component to finance the cost of repairs and renovations. All boards receive grants for school renewal. The grant is based on data reported by school boards in 1997.

- Has the grant for School Renewal effectively provided funding for repairs and renovations?
- How frequently should the data for the School Renewal grant be updated?
- Are the criteria currently included in the Pupil Accommodation Grant comprehensive enough to address issues of school repair and maintenance?
- How can new pupil places be dealt with in a fair and equitable manner?

### Accountability

The education system must be accountable to students, parents, and taxpayers for the resources it uses and the results it produces. A number of mechanisms were introduced to promote accountability, such as the "enveloped spending" provisions, which require school boards to direct funding toward specific expenditure categories. Some of the questions that arise are:

- How effective are the current accountability parameters such as reporting requirements, legislative parameters, etc., in improving learning outcomes?
- Is reporting of expenditures sufficiently transparent?
- How effective are current funding envelope requirements at providing appropriate support to specific programs and services?
- Should the government give boards the flexibility to remove or restructure expenditure envelopes?
- Should the Local Priorities Amount (introduced in 2001–02) be expanded to give boards increased flexibility to provide for local discretionary programs?
- Are there other changes that should be considered to provide boards with a more appropriate level of flexibility?
- If the government provided boards with multi-year funding, would that give boards greater flexibility and improve their planning processes?

### Affordability

The cost of education in Ontario, like the quality of education, should be comparable with the most effective school systems in other jurisdictions.

Under student-focused funding, school boards' revenues are largely driven by enrolment, and both operating and capital revenues are determined by formulas that include provincial cost benchmarks.

The government has introduced annual refinements to the funding model to address cost pressures and to implement policy changes. The Local Priorities Amount, first created in 2001–02, will allocate $400 million to school boards in 2002–03 in proportion to their share of the total enrolment. This funding is flexible, and can be used by boards to address local priorities, including cost pressures.

The cost benchmark for salaries of teachers and most other board staff was increased by 1.95% in 2000–2001. All other cost benchmarks are currently at 1997 levels.

- What is the best approach to recognize increased costs, while continuing to give boards incentives to use resources efficiently?
- Student-focused funding determines each board's allocation without regard to the source of revenue. Should this approach be maintained, or should boards have access to other sources of revenue to increase their flexibility?
- How can cost benchmarks be kept updated?
- How can stability in funding be sustained to assist planning?
- Are there alternative approaches to bargaining that would achieve fairness while promoting greater stability and improved budgeting?

# Appendix D: Components of the Student-Focused Funding Formula

The following descriptions of the grants and their components are based on information contained in the Ministry of Education documents *Student-Focused Funding: Parents Guide, 2002–03*, Spring 2002, and *Student-Focused Funding: Technical Paper, 2002–03*, Spring 2002. Consult these two papers, available on the Ministry of Education website, at www.edu.gov.on.ca, for more detailed information, as well as for the amounts of the grants for the 2002-03 school year.

## Foundation Grant

The Foundation Grant is intended to cover the components of a classroom education that are required by, and common to, all students. It allocates the same amount per student to all school boards and is based on a board's average daily enrolment, calculated twice yearly, in October and in March.

The classroom components covered are as follows:

- classroom teachers
- supply teachers
- staff development
- teaching assistants
- textbooks and learning materials
- classroom supplies
- classroom computers
- library and guidance services
- professional and para-professional supports (for example, social workers or computer technicians)
- teachers' preparation time
- in-school administration (including principals, vice-principals, department heads, and school secretaries)
- classroom consultants (for example, teachers who are reading specialists or who help other teachers develop and implement curriculum)

The Foundation Grant also includes a Local Priorities Amount, which school boards have the flexibility to use to meet their local needs.

## Special Purpose Grants

In addition to the Foundation Grant, all school boards receive Special Purpose Grants. These grants provide extra funding to meet additional student needs, which may vary from one student to another, that are not covered by the Foundation Grant, and additional board costs, which may vary from one board to another.

### Special Education Grant

The Special Education Grant provides boards with funding to serve students with special needs. Boards have the flexibility to determine how they will use their Special Education Grant – for example, to pay for special education teachers, teaching assistants, and other professionals such as psychologists or speech/language therapists – but they may only use it for special education purposes. Any unspent portion must be placed in a special education reserve fund.

The Special Education Grant has two major components:

- The **Special Education Per Pupil Amount (SEPPA)** is based on the total number of students the board serves, not just on those students who have been identified as needing a special education program. This funding acknowledges that a certain portion of any student population will have special needs. It is intended to fund the special programs and services these students need without requiring boards to take the time and incur the costs of formally identifying these students as "exceptional." (Under the Education Act, school boards are required to identify students who are "exceptional" – that is, those who have a high level of special needs. The definition of an "exceptional pupil" and the identification process are spelled out in the Act and regulations.)

- The **Intensive Support Amount (ISA)** is allocated to boards on the basis of their "incidence rate" of students with intense needs who require such costly supports as special equipment, teachers, and teaching assistants. Each year, boards submit claims to the Ministry of Education for the ISA funding they believe they need. The ISA is based on the ministry's review of these claims.

  In the 2001–02 school year, the ministry began a comprehensive review of ISA funding.

Boards are expected to combine the funding they receive from the Foundation Grant, other Special Purpose Grants, SEPPA, and ISA to provide students with special needs with the individual programs and services they require.

There are two other components to the Special Education Grant:

- The **Special Incidence Portion (SIP):** This component is for programs and services for students with exceptionally high needs. SIP funding is based on the Ministry of Education's review of boards' SIP claims.
- **Funding for Programs in Correctional, Care, and Treatment Facilities:** This component relates to education programs provided by school boards for children and youth in various local facilities and institutions, including hospitals, children's mental health centres, psychiatric institutions, detention and correctional facilities, community living/group homes, and other social services agencies.

One of the specific questions I was asked to address is whether the current approach to funding special education is the most responsive way to meet students' needs.

**Language Grant**

The Language Grant provides funding to meet boards' costs for language instruction. Every board receives a Language Grant, but the level of funding varies, depending on each board's needs in this area.

For English-language boards, the Language Grant provides funding for core French, extended French, and French immersion programs. It also provides funding for English-as-a-second-language/English skills development (ESL/ESD) programs for students who have come to Canada from countries where English is not a first or standard language, and for Canadian-born students whose language spoken at home is not English.

For French-language school boards, the Language Grant recognizes the higher costs of French-language learning materials and other aspects of French-language education. It also provides funding for *Actualisation linguistique en français* and *Perfectionnement du français*, programs designed to help students who are entitled to attend French-language schools but who have limited or no competency in French, and students who speak a variety of French that is different from standard French. The grant also offers some additional funding for boards situated in areas of the province where French-speaking people are in a minority and the English language predominates, to help these boards maintain a French-language learning environment and the cultural values they are striving to provide for their students.

In addition, the Language Grant provides funding for Native-language programs where offered by boards.

### Geographic Circumstances Grant

The Geographic Circumstances Grant is provided only to those boards that meet certain geographic criteria. It comprises the following three allocations:

- The **Small Schools Allocation** is intended to offset the higher per student cost of programs in small schools. Small elementary schools are defined as schools that have fewer than an average of 20 students per grade and that are located 8 or more kilometres from other elementary schools of the board. Small secondary schools are defined as schools that have fewer than an average of 120 students per grade and that are located 32 kilometres from other secondary schools of the board.

  This allocation contains a component for additional principals in boards that have a high proportion of small schools. Often such boards provide their small schools with part-time principals. Eligible boards may use this funding to provide more principals or to increase the amount of time part-time principals can spend on their principal duties.
- The **Remote and Rural Allocation** provides additional funding to meet the higher cost of goods and services experienced by boards that are remote from major urban centres, with students who are spread over a large area. Funding is calculated by measuring three factors: enrolment in the board's schools, distance from an urban centre, and the distance between schools and between schools and the board's central office.
- The **School Authorities Allocation** is reserved for school authorities, which are small school boards located in remote areas of Ontario and in some children's hospitals. The per student costs of school authorities are generally higher than those of other boards. The Ministry of Education uses a modified version of the student-focused funding model to calculate this allocation.

### Learning Opportunities Grant

The Learning Opportunities Grant includes three components:

- The **Demographic Component** permits boards to offer a wide range of programs to improve the achievement levels of students who are at risk of performing poorly in school. Boards have the flexibility to select programs that respond to local needs.

  To calculate this component, the Ministry of Education uses the following social and economic indicators, which research shows are associated with students at risk:
  - low family income
  - low parental education
  - lone parent status
  - Aboriginal status
  - recent immigration status
- The **Early Literacy Component** is aimed at improving the literacy of students in Junior Kindergarten (JK) to Grade 3. Funding is allocated on the basis of each board's share of average daily enrolment in JK to Grade 3. Boards are required to focus these resources on students with the greatest need – those whose reading readiness assessments show that they need remedial help and those who are achieving at level 1 or lower. (The Ministry of Education has established four levels of achievement for the Ontario Curriculum, with level 1 being the lowest.)
- The **Literacy and Math for Grades 7 to 10 Component** allows boards to offer additional support to enhance the literacy and math skills of Grades 7 to 10 students who are at risk of not meeting curriculum standards and the requirements of the Grade 10 literacy test. These courses or programs may be provided during the summer and during the school year outside of the regular school day. Funding is provided at a rate that is intended to support the average cost of providing a continuing education teacher for a class of 10 students. Funding is also provided for transportation of students in summer programs.

In addition, funding for school operations and school renewal under the Pupil Accommodation Grant is provided to boards that have students in Grades 7 to 10 literacy and math summer school programs, to offset the extra costs of operating schools during the summer.

### Continuing Education and Other Programs Grant

The Continuing Education and Other Programs Grant provides funding for adult day-school programs, continuing education programs, and correspondence/self-study programs for adult students, including summer school programs for adults. It also funds summer school and night school courses for high school students who are upgrading, making up courses, or fast-tracking (usually in order to transfer between applied and academic streams in secondary school).

The grant also provides funding for international language (heritage language) studies for elementary school students, calculated on the basis of the number of hours of classroom instruction and the size of the classes.

### Teacher Qualifications and Experience Grant

The Teacher Qualifications and Experience Grant provides funding to help boards meet teachers' salary costs that rise above the funding provided by the Foundation Grant. Teachers are paid according to their qualifications and experience. Because boards have different proportions of teachers with high levels of qualifications and experience, boards' salary costs vary. This grant acknowledges that some boards have higher salary costs for teachers.

The grant includes funding to meet the additional costs for teachers in boards whose secondary students take, on average, more than 7.2 credits per year. (The Foundation Grant provides funding for a typical student course load of 7.2 credits.) In the past few years, with the implementation of changes to the secondary school curriculum and the planned elimination in 2003 of the Ontario Academic Credit, many students have been taking additional credits. Boards have needed to hire more teachers to accommodate the higher course loads taken by students, and many boards' salary costs have therefore been higher than those envisaged by the Foundation Grant.

### Early Learning Grant

The Early Learning Grant provides funding to school boards that do not offer Junior Kindergarten (JK) at all or do not offer it everywhere in their jurisdictions. It is intended to help these boards provide programs that are similar or equivalent to JK to improve the learning achievement of their young students. (Boards that offer JK throughout their districts receive funding for JK through the Foundation Grant and other grants.)

### Transportation Grant

The Transportation Grant, which is under review by the Ministry of Education, provides funding to school boards for the transportation of students. The grant was increased in 2002–03 to assist boards until a new approach is developed and implemented. The ministry encourages boards to provide transportation services to their students in co-operation with other boards and to implement other student transportation efficiencies.

In my mandate, I was specifically asked to consider the ministry's approach to funding student transportation, including ways to maximize opportunities for shared busing services between school boards that serve the same communities.

### Declining Enrolment Adjustment

The Declining Enrolment Adjustment was added to the funding model in the current year (2002–03), in response to recommendations made by a stakeholder working group, to help boards with declining enrolment.

Because much of the funding boards receive is determined by enrolment, boards with declining enrolment lose revenue. In general, this is appropriate because, with fewer students, boards can reduce the number of teachers and support mechanisms they need. Some costs can be reduced easily.

For example, the number of classroom teachers can be reduced by rearranging classes to adjust to a reduction in enrolment. Other costs cannot be reduced easily. For example, reduced enrolment does not necessarily mean that a school can get by with fewer secretaries or that its heating and lighting costs will decline.

The province's overall rate of enrolment growth is slowing. As a result, the issue of declining enrolment will become more important over the next few years.

The present adjustment gives boards with declining enrolment two years to bring their costs in line with their reduced enrolment.

### Administration and Governance Grant

The Administration and Governance Grant provides funding for the governing of school boards, including trustees' honoraria and expenses, the funding of school councils, and the administrative costs of operating board offices, including the salaries of directors of education and supervisory officers. Trustees' honoraria are set at $5,000 per trustee (except for student trustees), and chairs and vice-chairs get an additional $10,000. Under this grant, all boards receive a base level of funding and additional funds that are determined by their number of trustees and students. Boards that receive funding under the Remote and Rural Allocation, the Demographic Component of the Learning Opportunities Grant (both discussed above), and the New Pupil Places Allocation of the Pupil Accommodation Grant (discussed below) also receive increased funding for board administration and governance.

## Pupil Accommodation Grant

The Pupil Accommodation Grant is intended to help school boards meet the costs of operating and maintaining their schools and, where warranted, provide new classroom accommodation. The grant has four main components:

### School Operations Allocation

The School Operations Allocation provides funding for heating, lighting, cleaning, and other routine maintenance of schools.

### School Renewal Allocation

The School Renewal Allocation provides funding for the renovation and repair of schools.

### New Pupil Places Allocation

The New Pupil Places Allocation provides funding for new schools or additions where boards are using all their existing school buildings effectively and cannot accommodate growth in student enrolment without new buildings or additions. The allocation provides funding at the level a board requires to finance construction costs over 25 years. The amount is also affected by a geographic adjustment factor, which acknowledges and responds to the varying cost of construction in different parts of Ontario.

All boards receive funding under the School Operations and School Renewal components. However, only those boards that are eligible for the New Pupil Places allocation receive funding under it.

### Prior Capital Commitments Allocation

The Ministry of Education maintains a Prior Capital Commitment fund to help boards finance the cost of capital projects that were approved before the student-focused funding formula was in place.

Each of these allocations is calculated on the basis of enrolment, benchmark area requirements, and benchmark costs.

# Appendix E: Participants in Roundtable Discussions

All roundtable discussions were held in Toronto.

## Trustees, August 13, 2002

***Association des conseillères et des conseillers des écoles publiques de l'Ontario (ACÉPO)***

Gilles Arpin
Member; Trustee, Conseil scolaire de district du Centre Sud-Ouest

Yvon Ferrand
President; Trustee, Conseil des écoles publiques de l'Est de l'Ontario

Louise Pinet
Executive Director

***Association franco-ontarienne des conseils scolaires catholiques (AFOCSC)***

Joseph Bisnaire
President; Trustee, Conseil scolaire de district des écoles catholiques du Sud-Ouest

Robert Gagné
Executive Director

Rhéal Perron
Member; Trustee, Conseil scolaire de district catholique Franco-Nord

***Ontario Catholic School Trustees' Association (OCSTA)***

Elizabeth Crowe
Director, Region 9; Trustee, York Catholic District School Board

Louise Ervin
President; Trustee, Waterloo Catholic District School Board

Bob Schreader
Director, Region 11; Trustee, Renfrew County Catholic District School Board

Paul Whitehead
Vice-President; Trustee, London District Catholic School Board (DSB 38)

***Ontario Public School Boards' Association (OPSBA)***

Gerri Gershon
President; Trustee, Toronto District School Board

Joan Hodge
Second Vice-President; Chair, Upper Canada District School Board

Rick Johnson
First Vice-President; Chair, Trillium Lakelands District School Board

Camille Quenneville
Director of Policy Development

Liz Sandals
Past-President; Trustee, Upper Grand District School Board

## Board Administrators, August 14, 2002

***Conseil ontarien des directrices et des directeurs de l'éducation de langue française (CODELF)***

Jean-Luc Bernard
Member; Director of Education, Conseil scolaire de district du Centre Sud-Ouest

Hélène C. Chayer
Member; Director of Education, Conseil scolaire de district catholique du Nouvel-Ontario

Marc P. Godbout
Member; Director of Education, Conseil des écoles catholiques de langue française du Centre-Est de l'Ontario

***Council of Ontario Directors of Education (CODE)***

Kevin Kobus
Member; Director of Education, Simcoe Muskoka Catholic District School Board

***Council of Senior Business Officials (COSBO)***

Marilyn Marklevitz
Co-Chair; Superintendent of Finance, Waterloo Region District School Board

***English as a Second Language/English Literacy Development Resource Group of Ontario (ERGO)***

Jill Maar
Consultant, York Region District School Board

***Ontario Association of School Business Officials (OASBO)***
Ed Hodgins
Member; Superintendent of Business, Trillium Lakelands District School Board

***Ontario Catholic School Business Officials' Association (OCSBOA)***
Bob Boucher
Member; Acting Director of Education, Sudbury Catholic District School Board

***Ontario Catholic Supervisory Officers' Association (OCSOA)***
Carol-Lynne Oldale
Member; Director of Education, Thunder Bay Catholic District School Board

Gerry Thuss
Member; Superintendent of Business, Huron-Perth Catholic District School Board

***Ontario Public Supervisory Officials' Association (OPSOA)***
Larry Langdon
President-Elect; Director of Education, Hastings and Prince Edward District School Board

## Parents, August 15, 2002

***Children and Youth at Risk Advisory Committee***
Linda Hunter
Chair

***Ontario Association of Parents in Catholic Education (OAPCE)***
Maire Bracken
President

Claire Budziak
Region 5 Vice President

Mary Ann Cuderman
Executive Director

***Ontario Federation of Home and School Associations (OFHSA)***
Judy Watson
Past President

Brian Peat
Member

***Ontario Parent Council (OPC)***
Trudy Griffiths
Chair

Donald Hill
Parent Member

Bonnie LaFontaine
School Council Representative

Michael O'Gorman
Parent Member

Dale Thomson
Parent Member

***Ottawa-Carleton Assembly of School Councils***
Lamar Mason
Member

***People for Education***
Cathy Dandy
Member of Toronto Parent Network

Cathy Gazzola
Member of Hamilton-Wentworth Assembly of School Councils

John Hoffman
Board Member

Brenda Hopkins
Chair of Thames Valley Regional Association of School Councils

## Taxpayers, August 16, 2002

***Ontario Association of Parents in Catholic Education (OAPCE)***
Mary Ann Tantulo
Member

Maureen Nolasco
Member

***Ontario Chamber of Commerce (OCC)***
Ian Cunningham
Senior Vice President, Chamber Relations and Administration

Bob Hinrichs
Member

***Ontario School Bus Association***
Richard Donaldson
Executive Director

***Ottawa-Carleton Catholic District School Board***
Cathy Urban
Ratepayer

***Ottawa-Carleton District School Board***
Nicole Dufresne-Baker
Chair, Education Task Force, Greater Ottawa Chamber of Commerce

***Supporting Public Access to Community Space Everywhere (SPACE)***
Louise Fast
Co-Commissioner, Girl Guides of Canada, Toronto Region

Susan Fletcher
Executive Director, Applegrove Community Complex, Toronto

David Rew
Executive Director, Boys and Girls Clubs of Ontario

## Students, August 19, 2002

***Dufferin-Peel Catholic District School Board***
Patricia Dantas
Student Representative

Teresa Racco
Student Trustee

***Ontario Secondary School Students' Association (OSSSA)***
Drew Evans
Regional President

Margaret Leung
Provincial Corporate Affairs

Kara Lilly
Student Premier

Marlena Rogosvkski
Minister of Provincial Resources

***Ontario Student Trustees' Association/ L'Association des élèves conseillers et conseillères de l'Ontario (OSTA/AECO)***
Angie Jonsson
First Vice-President

Melissa Ann Retty
President

Karl Baldauf
Former President and founder

***Ottawa-Carleton Catholic District School Board***
Trevor Arnason
Student Trustee

***Ottawa-Carleton District School Board***
Kyle Marsh
Student Trustee

Michael Sornberger
Student Trustee

***Peel District School Board***
Ashleigh Egerton
Student Trustee

***Toronto District School Board***
Janelle Khan
Student Trustee

William Wong
Student Trustee

## Urban School Boards, August 22, 2002

***Dufferin-Peel Catholic District School Board***
Michael Bator
Director of Education

***Durham District School Board***
Ron Trbovich
Superintendent of Education, Business Department, and Treasurer

Grant Yeo
Director of Education

***Hamilton-Wentworth Catholic District School Board***
Tony Davidson
Superintendent of Finance

***Ottawa-Carleton Catholic District School Board***
Thérèse Maloney Cousineau
Chair

Philip A. Rocco
Director of Education and Secretary-Treasurer

***Ottawa-Carleton District School Board***
Jim Libbey
Chair

Ron Lynch
Interim Director of Education

***Peel District School Board***
Lori Foote
President, Ontario Secondary School Teachers' Federation, District 19

Sue Lawton
Chair, Glenforest Secondary School Council

***Toronto Catholic District School Board***
Joseph Carnevale
Chair

Tom Donovan
Director of Education

***Toronto District School Board***
Donna Cansfield
Chair

Don Higgins
Superintendent of Business

Shelley Laskin
Trustee

***York Region District School Board***
Bill Crothers
Chair

Bruce Richardson
Associate Director of Education

### Special Education Organizations, August 26, 2002

***Community Living Ontario***
Marilyn Dolmage
Member

Ann Smith
Member

***Learning Disabilities Association of Ontario***
Carol Yaworski
Executive Director

***Learning Opportunities Task Force***
Eva Nichols
Consultant to the Chair

***Minister's Advisory Council on Special Education (MACSE)***
James Arthur
Member; Representative, Emotional/Behavioural Disorders, Catholic Community

Jean-Luc Bernard
Vice-Chair, Supervisory Officers, French-Language Community

Suzanne Earle
Member; Representative, Council for Exceptional Children and Ontario Council of Administrators in Special Education

Michelle Forge
Member; Superintendent, Student Services, Bluewater District School Board

Patricia Jamieson
Member; Representative, Ontario Council for Children with Behaviour Disorders

Suzanne Lacourcière-McLean
Member; Representative, Autism Society

Sheila McWatters
Member; Dufferin-Peel Catholic District School Board; Ontario Catholic Supervisory Officers' Association

Carol Ann Sloat
Member; Representative, Association for Bright Children

Diane Vandenbossche
Member; President-Elect, Ontario Council of Exceptional Children

Lynn Ziraldo
Chair; Representative, Learning Disabilities (all exceptionalities)

***Ontario Association of Speech-Language Pathologists and Audiologists***
Susan Menary
Member

***Ontario Psychological Association***
Dr. Maria Kokai
Member

### Teachers, August 27, 2002

***Association des enseignantes et des enseignants franco-ontariens (AEFO)***
Bernard Éthier
Assistant Executive Director

***Bluewater District School Board***
Nancy Lawler Miller
Teacher

***Elementary Teachers' Federation of Ontario (ETFO)***
Wambui Gaithu
Member; Toronto District School Board

Velma Liut
Member; Algoma District School Board

Janet Thompson
Member; Thames Valley District School Board

***Ontario English Catholic Teachers' Association (OECTA)***
Jeff Heximer
Department Head

Donna Marie Kennedy
First Vice-President

Elaine MacNeil
Second Vice-President

***Ontario Modern Language Teachers' Association (OMLTA)***
Peter David
Treasurer

Christine Roberts
Member

***Ontario Secondary School Teachers' Federation (OSSTF)***
Karl Dean
District 9, President

Susan Rab
District 25, Vice-President

***Ontario Teachers' Federation (OTF)***
Ruth Baumann
Executive Assistant

Kathleen Devlin
Executive Assistant

***Ottawa-Carleton District School Board***
Dave Wildman
Teacher

***Toronto District School Board***
Elizabeth Papadopoulos
Teacher

## Rural School Boards, August 28, 2002

***Algoma District School Board***
Ray DeRosario
Director of Education

Russell Reid
Chair

***Avon Maitland District School Board***
Dr. Lorne Rachlis
Director of Education

***Grand Erie District School Board***
Oscar Van De Walle
Citizen

***Hastings and Prince Edward District School Board***
Judy Edgar
Chair

Dave Rutherford
Superintendent of Finance

***Huron-Perth Catholic District School Board***
Gaetan Blanchette
Director of Education

Bernard Murray
Trustee

***Huron-Superior Catholic District School Board***
Art Callegari
System Administrator

Tim Holmes
Superintendent of Business

***Kenora Catholic District School Board***
Dr. Al Craig
Director of Education

***Lakehead District School Board***
Marilyn Gouthro
Director of Education

Steve Parfeniuk
Superintendent of Corporate Services

***Nipissing-Parry Sound Catholic District School Board***
Grace Barnhardt
Senior Business Officer

***Rainy River District School Board***
Warren Hoshizaki
Director of Education

***Renfrew County Catholic District School Board***
Dave Howard
Chair

***Renfrew County District School Board***
Peter Hamilton
Vice-Chair

***School Authorities***
Mike Lewis
Supervisory Officer; Caramat, Connell and Ponsford and Mine Centre District School Authorities

***Superior-Greenstone District School Board***
Bruce Rousseau
Superintendent of Business

Heather Wilson-Boast
Director of Education

***Superior North Catholic District School Board***
Scott Adams
Manager of Finance

## Support Staff, August 29, 2002

### *Canadian Union of Public Employees (CUPE)*

Anne Cowan
Secretary, Toronto District School Board

Donna Carlaw
Secretary, Kawartha Pine Ridge District School Board

David Chezzi
Custodial services, Sudbury Catholic District School Board

Rob Cullens
Busing, Rainbow District School Board

Michael Hennessy
Maintenance, Toronto District School Board

Dean MacDonald
Professional support, Kawartha Pine Ridge District School Board

Helen Manning
Music Instructor, Toronto District School Board

Charlotte Monardo
Child and Youth Worker, Kawartha Pine Ridge District School Board

Terri Preston
English-as-a-Second-Language Instructor, Toronto District School Board

Wendy Shieman
Educational Assistant, Ottawa-Carleton Catholic District School Board

John Weatherup
Heritage languages, Toronto District School Board

### *Ontario Secondary School Teachers' Federation (OSSTF)*

Jack Jones
Custodial services, Ottawa-Carleton District School Board

Cheryl Nicolls-Jones
Educational Assistant, Simcoe Muskoka Catholic District School Board

Donna Thompson
Office/Clerical support, Rainbow District School Board

## Principals, August 30, 2002

### *Association des directions et des directions adjointes des écoles franco-ontariennes (ADFO)*

Roger Gauthier
Member, Board of Directors; Conseil scolaire de district catholique des Grandes Rivières

Hélène Levesque
Treasurer; Conseil scolaire de district du Centre Sud-Ouest

Denis Malette
Member, Board of Directors; Conseil scolaire de district catholique des Aurores boréales

Serge Plouffe
Chair

### *Catholic Principals' Council of Ontario (CPCO)*

Michael Courchesne
Member; Nipissing-Parry Sound Catholic District School Board

Dr. Patricia Frankie-Deverell
Member; Dufferin-Peel Catholic District School Board

Nelly Kelders
President

Patrick Mulvihill
Member; Algonquin and Lakeshore Catholic District School Board

Richard Presse
Member; Simcoe Muskoka Catholic District School Board

Lou Rocha
Executive Director

### *Ontario Principals' Council (OPC)*

Michael Benson
Executive Director

Ian Mcfarlane
Member, Limestone District School Board

Sylvia Mills
Member, Keewatin-Patricia District School Board

Helen Spence
President

Ted Whiteland
Member, Upper Canada District School Board

## French-Language School Boards, September 5, 2002

***Association des agentes et agents de supervision franco-ontariens (ASFO)***

Françoise Fournier
Member; Conseil scolaire de district du Centre Sud-Ouest

Michel Paulin
Member; Superintendent of Business, Conseil scolaire de district catholique Franco-Nord

***Association des conseillères et des conseillers des écoles publiques de l'Ontario (ACÉPO)***

Mona Fortier
Representative

Ronald Marion
President

Louise Pinet
Executive Director

Rémy Beauregard
Consultant

Jean Tanguay
Consultant

***Association des directions et des directions adjointes des écoles franco-ontariennes (ADFO)***

Serge Plouffe
Chair

Claire Thibodeau
Vice-Chair

***Association des enseignantes et des enseignants franco-ontariens (AEFO)***

Lise Routhier-Boudreau
Chair

***Association franco-ontarienne des conseils scolaires catholiques (AFOCSC)***

Angèle Brunelle
Representative; Conseil scolaire de district catholique des Aurores boréales

Denise Labelle
Representative; Conseil scolaire de district catholique des Grandes Rivières

***Conseil ontarien des directrices et des directeurs de l'éducation de langue française (CODELF)***

Denis S. Chartrand
Member; Director of Education and Secretary-Treasurer, Conseil des écoles publiques de l'Est de l'Ontario

Lise Gadoury
Member; Director of Education, Conseil scolaire de district catholique Franco-Nord

Jean-Jacques Legault
Chairperson, French-Language Division; Director of Education and Secretary, Conseil scolaire de district catholique de l'Est ontarien

***Parents partenaires en éducation (PPE)***

Ghislaine Pilon
Member, Board of Directors; Conseil scolaire de district catholique Centre-Sud

# Appendix F: Participants in Meetings with Provincial Stakeholder Associations

All meetings with provincial stakeholder associations were held in Toronto.

## October 2, 2002

***Ontario Federation of Home and School Associations (OFHSA)***
Lesley Schuurs
President

Sue Robertson
First Vice-President

***Ontario Association of Parents in Catholic Education (OAPCE)***
Maire Bracken
President

Claire Budziak
Region 5 Vice President

Michele Piccini
Secretary

Connie Dresser
Treasurer

Mary Ann Cuderman
Executive Director

***Parents partenaires en éducation (PPE)***
Diane Ellis
President

Ghislaine Pilon
Member, Board of Directors

***Ontario Public School Boards' Association (OPSBA)***
Gerri Gershon
President

Rick Johnson
First Vice-President

Bob Allison
Adviser

Carla Kisko
Adviser

Sam McKinley
Adviser

Camille Quenneville
Director of Policy Development

Cynthia Andrew
OPSBA Staff

***Ontario Catholic School Business Officials' Association (OCSBOA)***
Jim LoPresti
President

David Visser
Vice-President

Wally Easton
Co-Chair, Finance Committee

Tony Davidson
Co-Chair, Finance Committee

Gerry Thuss
Member

Ryan Putnam
Member

***Council of Ontario Directors of Education (CODE)***
Angelo DiIanni
Chair

Barry O'Connor
Vice-Chair

Michel Serré
Past Chair

Frank Kelly
Executive Director

***Ontario Public Supervisory Officials' Association (OPSOA)***
Ruth Mattingley
President

Frank Kelly
Executive Director

Wayne McNally
Treasurer

***Ontario Association of School Business Officials (OASBO)***
Don Higgins
President

***Ontario Catholic School Trustees' Association (OCSTA)***
Louise Ervin
President

Paul Whitehead
Vice-President

Pat Daly
Member, Board of Directors

John Stunt
Executive Director

Carol Devine
Director, Political Affairs and Media Relations

***Ontario Catholic Supervisory Officers' Association (OCSOA)***
Pat Manson
President

John Watts
Vice-President

John Wheatley
Executive Director

***Ontario Parent Council (OPC)***
Trudy Griffiths
Chair

Dale Thomson
Parent Member

Julie Anne Heidman
School Council Representative

Donald Hill
Parent Member

Michael O'Gorman
Parent Member

Christine Beachey
Executive Co-ordinator

***Catholic Principals' Council of Ontario (CPCO)***
Nelly Kelders
President

Lou Rocha
Executive Director

***Ontario Teachers' Federation (OTF)***
Phyllis Benedict
President

Susan Langley
Secretary-Treasurer

Ruth Bauman
Executive Assistant

Kathleen Devlin
Executive Assistant

***Elementary Teachers' Federation of Ontario (ETFO)***
Emily Noble
President

Ruth Behnke
First Vice-President

Kathy Clarke
First Vice-President

David Clegg
Vice-President

Gene Lewis
General Secretary

Marilyn Roycroft
Deputy General Secretary

Barbara Richter
Executive Staff

Pat McAdie
Executive Staff

***Ontario English Catholic Teachers' Association (OECTA)***
Kathy McVean
President

Greg Pollock
General Secretary

***Association franco-ontarienne des conseils scolaires catholiques (AFOCSC)***
Joseph Bisnaire
President

Robert Gagné
Executive Director

***Association des conseillères et des conseillers des écoles publiques de l'Ontario (ACÉPO)***
Ronald Marion
President

Yvon Ferrand
Past President

Louise Pinet
Executive Director

## October 4, 2002

***Ontario Secondary School Teachers' Federation (OSSTF)***
Earl Manners
President

Dale Leckie
Acting Director, Protective Services Department

***Ontario Student Trustees' Association/ L'Association des élèves conseillers et conseillères de l'Ontario (OSTA/AECO)***
William Wong
President

***Ontario Principals' Council (OPC)***
Helen Spence
President

Michael Benson
Executive Director

***Minister's Advisory Council on Special Education (MACSE)***
Lynn Ziraldo
Chair

***People for Education***
Fiona Nelson
Chair

Annie Kidder
Director of Communications

Gay Stephenson
Co-ordinator, Parent Network

Katheryn Blackett
Co-ordinator of Research

***Conseil ontarien des directrices et des directeurs de l'éducation de langue française (CODELF)***
Marc Dionne
Chair

Marc Godbout
Vice Chair

***Toronto Board of Trade***
Louise Verity
Director of Policy

Terri Lohnes
Senior Economist and Policy Adviser

***Association des directions et des directions adjointes des écoles franco-ontariennes (ADFO)***
Serge Plouffe
Chair

***Association des enseignantes et des enseignants franco-ontariens (AEFO)***
Bernard Éthier
Assistant Executive Director

***Council of Senior Business Officials (COSBO)***
Marilyn Marklevitz
Co-Chair; Waterloo Region District School Board

John Sabo
Co-Chair; York Catholic District School Board

Ron Trbovich
Durham District School Board

Don Grant
Hamilton-Wentworth District School Board

Rick Gales
Upper Canada District School Board

Steven Parfeniuk
Lakehead District School Board

Ed Hodgins
Trillium Lakelands District School Board

Terry Miller
Dufferin-Peel Catholic District School Board

John Guyatt
Toronto Catholic District School Board

Peter Derochie
Simcoe-Muskoka Catholic District School Board

Carla Kisko
Halton District School Board

Michel Paulin
Conseil scolaire de district catholique Franco-Nord

Bob Boucher
Sudbury Catholic District School Board

Pierre Filiatrault
Conseil scolaire de district catholique du Centre-Est de l'Ontario

Luc Latulippe
Conseil des écoles publiques de l'Est de l'Ontario

***Fédération de la jeunesse franco-ontarienne (FESFO)***
Noémi Paquette
President

***Canadian Union of Public Employees – Ontario Region (CUPE)***
Brian O'Keefe
Secretary and Treasurer

Charlotte Monardo
Chair, School Workers Co-ordinating Committee

Judy Wilkings
CUPE National Researcher

Paul O'Donnell
Legislative Liaison

***Ontario Chamber of Commerce***
Ian Cunningham
Senior Vice-President, Chamber Relations

Rob Hinrichs
Volunteer

***Ontario Secondary School Students' Association (OSSSA)***
Kara Lilly
Student Premier

***Ontario Catholic Student Council Federation (OCSCF)***
John-Paul Rodrigues

# Appendix G: Individuals and Organizations That Made Presentations and/or Provided Written Submissions

This list reflects all submissions received on or before October 4, 2002, where names of those making the submissions could be identified. Some of the individuals listed below made joint submissions. The total number of individuals and organizations in this appendix may therefore vary from the total number of submissions received that is cited in Chapter 1.

## Individuals

Lyn Adamson
Dualeh Ahmed
Paul Aird
Leslie Andrew
Clair Angus
Sandra Anstey
Ben Anthony
Lindsay Ashwin
Peter Askey
Keith Auyeung
Vi Bain
Karl Baldauf
Joan Bale
Viraf Baliwalla
Toby Barrett, M.P.P.
Lyn Barsevskis
Mark Barsevskis
R.E. "Bob" Bartman
Luz Bascuñan
David Bauer
Helaine Becker
Donald W. Beggs
Gay Bell
Laurie Bell
Cindy Beman
Brenda Bennett-Learmonth
Phil Benson
Estelle Berry
Judith Bobka
Bernie Boesveld
Janet Bojti
Margaret-Elizabeth Borbely
Bryan Boughey
Catharine Boyce
Erin Boyce
Sara Boyce
Den Boychuk
Wendy Branson
Carol Brascoupe
Heather Brassem
Mary Breen
Judy Brown
Georgina Bruinsma Cajic
Irmgard Burchardt
F. Burnett
Marjorie Button
Mauela Byrnes
Rick Campbell
Terry Card
Susan Cardy
Don Cattani
Catherine Catton
Pat Cepin
Kathryn Chadwick
Vincent Chen
Terry Chisholm
Dr. Rosie Chong
Carl Chopp
Marilyn Churley, M.P.P.
Sheila Clarke
Ken Cleveland
John Clubine
Robert Code
Mike Colle, M.P.P.
Mary Louise Colquhoun
Casey Conklin
Phoebe Conway
Derrick Cooke
Tracy Cooke
Sheila Corkill
Alan Crook
L.D. Cross
Diana Daghofer
Nancy Dalrymple
Ron Dancey
Cynthia Dann-Beardsley
Alan Davidson
David Dawe
Ghi Dean
Greg deGroot-Maggetti
Marlene deGroot-Maggetti
Paula DeLorenzi
Denise Dennis
Lorie Dertinger
Dr. Janet de Ruiter
Michelle de Vos
A. Dewar
Paul Dewar
Caroline Di Cocco, M.P.P.
Susan Dingnan
Mercedez Di Nino
Cheryl Dinnin
St. John Dixon-Warren
Sally Drew
Flo Duncan
Harold Duncan
Susan Dykstra
Greg Edwards
Chris Ellis
Ihsan El-Sayed
Jim Emptage
Dag Enhorning
Andrea Esson
Brenda Fairweather
David Farley
Don R. Farquharson
Ute Fenner
Blair Fergusson
Paul Fernandes
Philip Fernandez

Lori Fisher
Pam Fitzgerald
David Fleet
David Fogarty
Ann Ford
Kim Forster
Janelle Fournier
Missy Fraser
Ryan Friedman
Bronwyn Funicello
Tracey Gagliardi
Diana Gauthier
Laura Gerber
Anna Germain
Helen Gerson
Peter Gillespie
Lijana Gleason
Paul Gleason
Chris Glover
Bette-Ann Goldstein
Stephen Goring
Juliette Gostyn
Patricia Gough
Kerri Graham
Julius Greff
E.J. Haggerty
Madeleine Hague
Dan Halas
Nancy Halbert
Nicole Haley
Bev Hall
Valerie Hall
Judy Halpern
Judy Hamilton
Howard Hampton, M.P.P.
Carla Hathaway
Gene Hayden
Lianne Hearne
Peter H. Hennessy
Margaret Hennig
Darcy Higgins
Elizabeth Hill
Lotje Hives
Graham Hollings
John Hoffman
T.J. Holmes
Nancy Hood
Brenda Hopkins
Tracy Horsman
Marg Hryciw
Catherine Hunt
Suad Iamad
Nancy Icely
Bernie Ikeda
Barbara Imrie
Anita Isaac
Paul Isaacs
Graham Jackson
Nancy Jackson
Laurie Johnson
Tracy Johnson
Rory Jones
M. Carl Kaufman
Mike Kelly
John Kent
Dr. Carol Ann Kernoff
Kris Kernohan
Ellen Kert
David King
Jill King
Sharon Kirkby
Dr. Maria Kokai
Tom Koperwas
Lorraine Kor
David N. Kornhauser
Joan Kott
Cliff Kraeker
Marie Kraus
Ellen Kurt
Pat Lacasse
Paulyne Lack
Marie Lafrenière
Jean-Marc Lalonde, M.P.P.
Arthur Lamarche
J.D. Lambert
Louisette Lanteigne
Noel Laplante
Jim Leet
Myrna Levy
Chris Li
Judi Lian
Kathy Lindsay
Grant Linney
Linda Lister
Michelle Little
Pat Little
Barb Loma
Cindy Long
John Lorinc
Anne-Marie Lott
Garry Lukachko
Peter Lutek
Peter Lynch
Cynthia MacDonald
Faye MacDonald
Kim MacDonald
Rick MacDonald
Lisa MacKinnon
David T. MacLeod
Lorraine MacLeod
Cathy Mallove
Sally Mancini
Tim Marks
Margaret Marland, M.P.P.
Tara Marshall
Lori Martin
Bonnie Martino
Carol Ann Mascherin
Irene Mathyssen
Dan Maxwell
Sean McCammon
Pam McConnell
Wes McConnell
Suzanne McCormick
Bob McCracken
Karen McCulloch
Garth McGill
Hugh McKechnie
Maureen McKinney
Beth McLellan
Kirk McMahon
Nancy McNabb
Sandra McNairn
Vickie McPhee
Garry McPhie
Agostino Menna
Chris Mermer
Lisa Salter Michaelson
Carolyn Miller
David Miller, Councillor,
City of Toronto
R.G. Miller
Rick Moffitt
Nick Monsour
Cristina Montes
Bonnie Montminy
Greg Moon
Audrey Moore
Tracy Morency
Elaine Morgan
Siegmund Morgenstein
Kelly Mudry
Bill Muirhead

Laura Muirhead
Bill Murdoch, M.P.P
John Murphy
Kelly Murphy
Gregory Murray
Nancy Myers
Joanne Naiman
Fiona Nelson
Sandra Neményi
Linda Ness
Terri Nikolasevic
Michael O'Keefe
F.J. O'Grady
Mirka Orde
Marina Orzano
Anita Osborne
Nancy Palmer
Evalina Pan
MaryLou Parker
Jane Parry
Brenda Partridge
Jocelyne Pasman
Dudley Paul
John Pecsenye
Laurie Peterson
Dr. Michele Peterson-Badali
Yvonne Pezzack
Gerry Phillips, M.P.P.
Kathleen Pick
Bill Pike
Debbie Piquette
Errol Platt
Sally Plumb
Walter Pointner
Joseph Polito
Janet Poudrier
Jeff Prentice
Karen Prince
Colin Pritchard
Bob Prus
Susan Rab
Josee Rainville
Tim Ralph
Dr. John M. Ramsay
Peter Rasberry
Christopher Rees
Kim Reid
Hilde Reis-Smart
Mari Retka
Susan Richard
Susan Richman
Dale Ricker
Jill Ricker
Helen Riley
Barbara Robinson
Trevor Robinson
John Rodgers
Rico Rodriguez
Adela Roki
Edward Rooney
Linda Rosen
Christopher Rowles
Dianne Rubinoff
Tony Ruprecht, M.P.P.
Mari Rutka
Lisa Salter Michaelson
Helen Saraga
Michel Saraga
Olivia Sargeant
Karen Sarlo
Kathy Sauro
Donald C. Savage
Marc-André Savoie
John Sayer
Frances Schatz
Zoltan Schreindlar
Ian B. Scott
Janine Scott
Marthe Scott
Nancy Sedore
Mario Sergio, M.P.P.
Leslie Shannon
Sandee Sharpe
Ronald Shewchuk
Joe Simpson
Ann Smith
Brian Smith
Fred Smith
Hugh Smith
Maranda Smith
Alyson Soko
Marianne Sollberger
Mimi Spencer
Sophia Sperdakos
Julie Spry
Diana Stapleton
Dave Stephens
Lorraine Stockie
Carrie Ann Taylor
Jo-Ann Taylor
Wendy Terry
Kathleen Therriault
Cindy Thomas
Scott Thomas
Jennifer Thurtell
John Tovey
Luigi Tucci
Tracey Turner
Robert Turvey
Susan Van Dyk
John Vandergraf
Oscar Van de Waller
Jane Veit
Julie Verrino
Steve Vespa
Anton Vidgen
Alexandra Vilde
Bev Vogel
Robert Vollum
Jane Wadden
Lillian Wagman
Carolyn Walker
Christine Wallace
Will Wallace
Heather Walters
Giles Warren
Lynn Watson-Sénécal
Aileen Weir
Phil Weir
Joanne Weishuhn-Lee
Dennis Wendland
Donald R. Werden
Laura Wheeler
Pat Whelihan
Suzanne Whitney
Lisa Widdifield
Dave Wildman
Ron Williamson
A.C. Wilson
Paul Wilson
Mark Witcomb
Megan Wood
Robert Wood
Al Woodhouse
Gordon Wright
Peter Wynnyczuk
Diane Zelem
Fang Zhai

### Organizations

This list includes school boards.

8/36 and 11/38 Bus Operators Association, Provincial Viability Committee of the Ontario School Bus Operators Association, and The Great Lakes Transportation Committee

African Canadian Legal Clinic

Air Cadet League of Canada

Algonquin and Lakeshore Catholic District School Board

Allenby Parents' Association – Public Education Access Committee

Allenby Public School Education Awareness Committee

Alternative School Advisory Council/Parents for Alternative Schools

Applegrove Community Complex

ARCH: Legal Resource Centre for Persons with Disabilities

Army Cadet League of Canada (Ontario)

Association des conseillères et des conseillers des écoles publiques de l'Ontario

Association des directions et des directions adjointes des écoles franco-ontariennes

Association des enseignantes et des enseignants franco-ontariens

Association des enseignantes et des enseignants franco-ontariens Centre-Sud et Sud-Ouest conseil publique n$^{o}$ 58

Association for Canadian Educational Resources

Association for Education and Rehabilitation Ontario

Association franco-ontarienne des conseils scolaires catholiques

Association of Library Consultants and Co-ordinators of Ontario

Association of Professional Student Services Personnel

Avon Maitland District School Board

Avon Maitland Parents

Bedford Park Elementary Public School Council

Bedford Park Elementary Public School Council Education Advocacy Committee

Black Action Defence Committee

Bloor Collegiate Parent Council

Bluewater District School Board

Bowmore Public School Students

Brampton Caledon Community Living

Brant/Haldimand-Norfolk Catholic District School Board

Burnhamthorpe Public School

C.D. Farquharson Junior Public School Students

Caledon Central Public School Council

Campaign for Public Education

Campaign for Stable Funding of Adult English-as-a-Second-Language Classes

Canadian Association for Health, Physical Education, Recreation and Dance

Canadian Association for the Advancement of Women and Sport and Physical Activity

Canadian Association of Student Activity Advisors

Canadian Coalition for School Libraries

Canadian Educational Resources Council

Canadian Federation of University Women – Oakville

Canadian Federation of University Women – Ontario Council

Canadian Parents for French

Canadian Union of Public Employees – Ontario Region

Canadian Union of Public Employees – Ontario Region 1165

Canadian Union of Public Employees – Ontario Region 2204 Child Care Workers of Eastern Ontario

Canadian Union of Public Employees – Ontario Region 2357 Ottawa-Carleton Catholic District School Board Support Staff

Canadian Union of Public Employees – Ontario Region 4156 District School Board of Niagara

Canadian Union of Public Employees – Ontario Region 4186 London Catholic District School Board

Canadian Union of Public Employees – Ontario Region 4222

Canadian Union of Public Employees – Ontario Region 4400

Canadian Union of Public Employees – Ontario Region Thunder Bay

Cashmere Avenue Public School

Catholic Children's Aid Society of Toronto

Catholic District School Board of Eastern Ontario

Catholic Principals' Council of Ontario

Catholic School Business Officials' Association

Catholic School Business Officials' Association – Plant/Health and Safety Committee

Cawthra Park Secondary School

Cedarbrae Collegiate Institute School Council
Centennial (Waterloo) Public School Council
Chatham-Kent Secondary School Parent Council
Chiefs of Ontario
Children and Youth at Risk
Children and Youth at Risk Advisory Committee/ Frederick Banting Alternative School
Children's Aid Society of Hamilton
Citizens for Public Education
Cisco Systems Canada Co.
City of St. Catharines
City of Toronto – Office of the Chief Administrative Officer
City of Toronto – Parks and Recreation Division
Coalition for Educational Reform
Coalition for Music Education in Canada
Coalition of Educational Assistants of Ontario
Colborne Central Public School Council
College Heights Secondary School
Communist Party of Canada (Ontario)
Community Living London
Community Living Ontario
Community Living Stormont County
Concerned Parents of Toronto
Conseil d'école secondaire Confédération
Conseil ontarien des directrices et des directeurs de l'éducation de langue française
Conseil scolaire de district catholique de l'Est ontarien
Conseil scolaire de district catholique des Aurores boréales
Conseil scolaire de district catholique des Grandes Rivières
Conseil scolaire de district catholique du Centre-Est de l'Ontario
Conseil scolaire de district catholique du Nouvel-Ontario
Conseil scolaire de district catholique Franco-Nord
Conseil scolaire de district des écoles catholiques du Sud-Ouest
Conseil scolaire de district des écoles publiques de l'Est de l'Ontario
Conseil scolaire de district du Centre Sud-Ouest
Conseil scolaire de district du Grand Nord de l'Ontario
Conseil scolaire de district du Nord-Est de l'Ontario
Continuing Education School Board Administrators, South Western Ontario Division
Coordinators of Attendance Counselling (Toronto District School Board)
Cornwall Parent Support Group
COSTI Immigrant Services
Council of Ontario Directors of Education
Council of Outdoor Educators of Ontario
Council of Senior Business Officials
Darlington Public School Parent Council
Delhi District Secondary School Council
Dilico Ojibway Child and Family Services
District School Board Ontario North East
Down Syndrome Association of Ontario
Dufferin-Peel Catholic District School Board
Dundas County Community Living
Dundas Street Public School
Durham Catholic District School Board
Durham District School Board
Durham District School Board Parent Council
Earl Grey Senior Public School Council
East Alternative School Parent Council
Educational Policy Advisory Committee
Eglinton Public School Students
Elementary Teachers' Federation of Ontario
Elementary Teacher's Federation of Ontario – Avon Maitland Teachers Local
Elementary Teacher's Federation of Ontario – Near North Local
Elementary Teacher's Federation of Ontario – Peel Local
Elementary Teacher's Federation of Ontario – Thames Valley Local
Elementary Teachers' Federation of Ontario – Thames Valley Occasional Teachers' Local
Elementary Teachers' Federation of Ontario – Toronto Local
Elementary Teachers' Federation of Ontario – Toronto Occasional Teachers' Local
Elementary Teachers' Federation of Ontario – Upper Canada District School Board
Elementary Teachers' Federation of Ontario – Waterloo Local
Elmcrest Public School Council
Enerlife Consulting
English as a Second Language/English Literacy Development Resource Group of Ontario
Eramosa Public School Advisory Council

Etobicoke Parents for Public Education
Fairglen Junior Public School Students
Family and Children Services of Guelph and Wellington County
Fédération de la jeunesse franco-ontarienne
Federation of Ontario Naturalists
Forest Valley Outdoor Education School
Freedom Party of Ontario
French as a Second Language Community Liaison Group
G.B. Little School Advisory Council
Gananoque Secondary School
Gananoque Secondary School Council
Ganaraska Region Conservation Authority
Girl Guides of Canada
Girl Guides of Canada – London/Middlesex Board
Girl Guides of Canada – Toronto Area
Glebe Collegiate Institute School Council
Glendale High School
Grand Erie District School Board Staff
Greater Essex County District School Board Staff
Greater Ottawa Chamber of Commerce
Greater Toronto Catholic Parents' Network
Greenbriar Parent Council
Grenville Land Stewardship Council
Halton Catholic District School Board
Halton District School Board
Hamilton-Wentworth Catholic District School Board
Hamilton-Wentworth District School Board
Hammond Transportation
Hastings and Prince Edward District School Board
Highway 11 Corridor Municipal Coalition
Holy Rosary School
Huntley Centennial Elementary School Council
Huron-Perth Catholic District School Board
Huron-Superior Catholic District School Board
IBM Canada
Industrial Education Services
Inner City Network
Institute for Catholic Education
International Language Korean Program at Portage Trail Community School
Island Natural Science Program (Toronto District School Board)
James A. Magee Community School Council
John G. Diefenbaker Public School Students
John Ross Robertson Public School Council
Joint Rural Education Committee of the Huron and Perth County Federation of Agriculture
Justice for Children and Youth
Kawartha Pine Ridge District School Board
Keewatin-Patricia District School Board
Kenora Catholic District School Board
Kitchener Downtown Business Association
Laidlaw Foundation
Lakehead District School Board
Lakehead District School Board – Special Education Advisory Committee
Lakehead Elementary Teachers' Association
Lakehead Regional Family Centre
Lambton Kent District School Board
Lancaster School Council
Laurel Creek Outdoor Education Centre (Waterloo Region District School Board)
Learning Disabilities Association of Ontario
Learning Opportunities Task Force
Limestone District School Board Staff
London and District Labour Council
London District Catholic School Board
London District Catholic School Council
Lorne Park Public School Council
Lorraine Kimsa Theatre for Young People
Marchmont Public School Parent Council
Matawa First Nation
McGillivray Public School Parent Council
Metrus Development Inc.
Microsoft Canada
Middlesex London Health Unit
Minister's Advisory Council on Special Education
Mood Disorders Association of Ontario
Multicultural Council of Toronto
Municipality of North Bruce Peninsula
Muslim Parents' Association
Nativity of Our Lord Catholic School
Navy League of Canada – Ontario Division)
Near North District School Board
Near North District School Board – Kindergarten Association North
Nipissing-Parry Sound Catholic District School Board
North Bay Literacy Council

Northern Ontario Education Leaders
Northern School Resource Alliance
Northern Secondary School Council
Northwest Catholic District School Board
Northwestern School Boards
Oakville Public Library
Office of the Commissioner of Official Languages
Ontario Association for Families of Children with Communication Disorders
Ontario Association of Children's Aid Societies
Ontario Association of Counselling and Attendance Services
Ontario Association of Parents in Catholic Education
Ontario Association of School Business Officials
Ontario Association of Specialty Program Schools
Ontario Association of Speech-Language Pathologists and Audiologists
Ontario Catholic School Business Officials' Association
Ontario Catholic School Trustees' Association
Ontario Catholic Student Council Federation
Ontario Catholic Supervisory Officers' Association
Ontario Chamber of Commerce
Ontario Coalition for Inclusive Education
Ontario College of Teachers
Ontario Conference of Catholic Bishops
Ontario Council for Children with Behavioural Disorders
Ontario Council of Administrators of Special Education
Ontario English Catholic Teachers' Association
Ontario English Catholic Teachers' Association – Durham Elementary Unit
Ontario English Catholic Teachers' Association – Eastern Unit
Ontario English Catholic Teachers' Association – London District
Ontario English Catholic Teachers' Association – Niagara Unit
Ontario English Catholic Teachers' Association – Nipissing Elementary Unit
Ontario English Catholic Teachers' Association – Ottawa-Carleton Catholic District School Board
Ontario English Catholic Teachers' Association – Ottawa-Carleton District School Board
Ontario English Catholic Teachers' Association – Secondary
Ontario English Catholic Teachers' Association – Simcoe Muskoka Elementary
Ontario English Catholic Teachers' Association – Toronto Secondary Unit
Ontario Federation of Agriculture
Ontario Federation of Home and School Associations
Ontario Federation of Home and School Associations – Region 1
Ontario Federation of Labour
Ontario Federation of School Athletic Associations
Ontario Guidance Association – Western Region
Ontario Guidance Leadership Association
Ontario Healthy Schools Coalition
Ontario Library Association
Ontario Parent Council
Ontario Physical and Health Education Association
Ontario Principals' Council
Ontario Public School Boards' Association
Ontario Public Supervisory Officials' Association
Ontario School Bus Association
Ontario School Counsellors' Association
Ontario School Library Association
Ontario Secondary School Students' Association
Ontario Secondary School Teachers' Federation
Ontario Secondary School Teachers' Federation – District 6A
Ontario Secondary School Teachers' Federation – District 7 Bluewater Teachers
Ontario Secondary School Teachers' Federation – District 9 Greater Essex Teachers
Ontario Secondary School Teachers' Federation – District 11 Thames Valley Teachers
Ontario Secondary School Teachers' Federation – District 12
Ontario Secondary School Teachers' Federation – District 12 Professional Student Service Personnel
Ontario Secondary School Teachers' Federation – District 17 Teacher Bargaining Group
Ontario Secondary School Teachers' Federation – District 24 Waterloo Region
Ontario Secondary School Teachers' Federation – District 25
Ontario Secondary School Teachers' Federation – Education Finance Committee
Ontario Secondary School Teachers' Federation – Near North
Ontario Secondary School Teachers' Federation – Ottawa-Carleton Education Support Professionals

Ontario Secondary School Teachers' Federation – Toronto Substitute Teachers

Ontario Special Olympics

Ontario Student Trustees' Association/L'Association des élèves conseillers et conseillères de l'Ontario

Ontario Teachers' Federation

Orchard Park School Council

Organization for Quality Education

Organization of Parents of Black Children

Orillia District Collegiate and Vocational Institute School Council

Ottawa Carleton Assembly of School Councils

Ottawa-Carleton Association for Persons with Developmental Disabilities

Ottawa-Carleton Catholic District School Board

Ottawa-Carleton Catholic District School Board – Special Education Advisory Committee

Ottawa-Carleton Catholic District School Board Support Staff

Ottawa-Carleton District School Board

Ottawa-Carleton District School Board – Advisory Committee on the Arts

Ottawa Carleton District School Board – Special Education Advisory Committee

Ottawa Carleton Student Transportation Association – Laidlaw Education Services

Ottawa Children and Youth at Risk Advisory Committee

Ottawa Technical Learning Centre

Our Schools, Our Communities

Overland Learning Centre Advisory Committee

Parent Community Network – Toronto District School Board

Parent Council at Mount Carmel School

Parent Council at William Burgess Elementary School

Parents' Action Group

Parents for Alternative Schools

Parents of Deaf Plus Ontarians

Parents of the Township of Georgina

Parents partenaires en éducation

Parkholme School

Parks and Recreation Ontario

Peel District School Board

Peel Principals' and Vice-Principals' Association

People for Education

Peter L. Roach Catholic Education Centre

Peterborough Collegiate and Vocational School Council

Peterborough Victoria Northumberland and Clarington Catholic District School Board

Phi Delta Kappa International

Port Dover Save Our School Committee

Queen Elizabeth School Council

Rainbow District School Board

Rainy River District School Board

Red Sky Métis Independent Nation

Regional Municipality of Waterloo

Regional Section 19 Task Force/Young Parents' Resource Organization

Renfrew County Catholic District School Board

Renfrew County District School Board

Resurrection School Council

Retired Teachers of Ontario

R.H. King Academy School Council

Rideauwood Addiction and Family Services

Ridgewood School Council (Peel District School Board)

Robert-Smart Centre (Children's Mental Health Centre)

Royal Canadian Sea Cadets/Navy League Cadets (Ontario Division)

Runnymede Public School Council

Sarnia District Labour Council

Scarborough Outdoor Education School (Toronto District School Board)

Scarborough Village Alternative Public School Parent Council

Scarborough Village Public School Parent Group, Handicapped Wing

School Advisory Council at Drewry Secondary School

School and Community Council of Bruce Peninsula District School in Lion's Head

School Community Advisory Council of South Grenville District High School

School Community Council of Owen Sound Collegiate and Vocational Institute

School Council at École élémentaire publique Le Prelude

School Council of A.B. Lucas Secondary School

School Council of Agincourt Collegiate Institute School

School Council of Assumption College School

School Council of Cathcart Boulevard Public School

School Council of Hornepayne High School
School Council of Maple Grove Public School
School Council of Park Lawn Junior-Middle School
School Council of Sir Winston Churchill High School
School Council of White Stone Lake Central School
School Councils of Elementary Public Schools in Oakville
Science Coordinators' and Consultants' Association of Ontario Executive
Seaway District High School
Seven Generations Education Institute
Severn, Tay and Ramara Townships
Silver Creek School Council
Simcoe County District Health Unit
Simcoe County District School Board
Simcoe County Principals' Association
Simcoe County School Bus Operators' Association
Simcoe Muskoka Catholic District School Board
Sparrow Lake Alliance
Sparrow Lake Alliance Steering Committee
St. Anne High School Council
St. Cecilia Catholic School Council
St. Clair Catholic District School Board
St. David School
St. Edmunds Parent Council
St. Helen's School Council
St. Helen's School Parent Council
St. John's College Parent Council
St. Joseph's Elementary School
St. Jude's School – Scholars' Hall
St. Lawrence Catholic School
St. Matthew Catholic School Council
St. Theresa's Catholic School Council
Students Towards Environmental Protection
Sudbury Catholic District School Board
Sudbury Catholic District School Board Principals' Group
Sullivan School Community School Council
Summit Heights Elementary School Council
Superior-Greenstone District School Board
Superior North Catholic District School Board
Supporting Public Access to Community Space Everywhere
Tait Street School Advisory Council
Tamil Eelam Society of Canada
Thames Valley District School Board
Thames Valley Principals' Association
Thames Valley Teacher-Librarians' Association
Thunder Bay Catholic District School Board
Thunder Bay Catholic District School Board – Special Education Advisory Committee
Thunder Bay Green Party
Thunder Bay Superior North Riding Association of the Green Party
Tollgate Central School Council
Toronto Adult Education Association
Toronto and York Region Labour Council
Toronto Association for Community Living
Toronto Association of Parents in Catholic Education
Toronto Board of Trade
Toronto Catholic District School Board
Toronto Catholic District School Board – Special Education Advisory Committee
Toronto District Music Coalition
Toronto District School Board
Toronto District School Board – Ward 16 Parent Council
Toronto District School Board – Youth Counsellors
Toronto Elementary Catholic Teachers' Association – Toronto Catholic District School Board
Toronto English Catholic School Teachers' Association
Toronto Family Network
Toronto Federation of Chinese Parents
Toronto Parent Network
Trillium Lakelands District School Board
United Way of Greater Toronto
University of Guelph, School of Rural Extension Studies
University of Toronto, Faculty of Physical Education and Health
University of Toronto, Transitional Year Programme
University of Western Ontario, School of Kinesiology
University of Windsor, Faculty of Human Kinetics
Upper Canada District School Board
Upper Grand District School Board
Ventin Group Ltd.
Victoria Park Secondary School Council
VOICE for Hearing Impaired Children
Voices for Children

Waterloo Catholic District School Board
Waterloo Region District School Board
Wellington Catholic District School Board
West Carleton Secondary School Council
West Elgin Secondary School Council
Westminster Public School
White Stone Lake Central School Council
Widdifield Secondary School Council
Windsor-Essex Catholic District School Board
Windsor-Essex Catholic District School Board – High School Parents' Council
Windsor Jewish Community Centre
York Catholic District School Board
York Catholic District School Board Community
York Catholic Teachers' Association
York Environmental Education Consortium
York Mills Collegiate Parent Council
York Region District School Board
York Region District School Board – Race Relations Advisory Committee
Youth Counsellors at the Toronto District School Board

# Appendix H: Approach Used to Estimate the Cost of Updating the Benchmarks

In order to estimate as closely as possible the cost implications of my recommendations, I had to develop an approach to updating the benchmark costs in the funding formula. In doing so, I did not attempt to validate the existing benchmarks, but rather focused on developing an updating methodology to use for the purposes of this report. I was guided by two principles:

- simplicity: I wanted to keep the process simple. The student-focused funding formula, while significantly less complicated than its predecessor, remains a relatively complicated mechanism to understand and to explain.
- transparency: I wanted to include the updating methodology used by the task force in the report so that all stakeholders could review it. I am grateful to ministry staff for providing some of the data, without which I could not have made all of the calculations.

I reviewed several studies on updating benchmarks and appreciate that there is more than one way to update them.[1] (Notes for this appendix are at end of this appendix.) I am sure that, if my recommendations 1 through 3 are implemented, the Ministry of Education, school boards, and other members of the education community will want to review my approach and modify it as necessary for their own updates. Over the long term, the ministry may even wish to consider repeating the costing exercise conducted in 1997, which informed the establishment of the 1998 benchmarks.

One approach I considered involved examining estimates of actual costs for the most recent school board fiscal year (September 2001 to August 2002). Another involved applying various estimates of price or cost changes to the original benchmark costs. Because all the final costs for the most recent fiscal year are not yet known (in some cases, detailed cost data for the province as a whole has simply not yet been collected), I opted to use a combination of these two approaches: I have adjusted some benchmarks on the basis of current cost estimates and others on the basis of the Ontario Consumer Price Index, its components, and other price change information.[2]

The base year for my update is 1998, the year the current funding formula came into effect, except where the Ministry of Education has added funding since 1998 and prior to 2002–03.[3]

In developing the update, I recognized that for some boards increases in some costs may have been smaller than average because of cost-saving measures they may have implemented in the period preceding 1998, such as transportation and purchasing consortia. While I applaud these measures, I did not attempt to analyse them or to factor them into my updating mechanism. Further, I believe that boards should not be penalized for saving money by having the benchmark costs downgraded to reflect the new, actual costs that result from cost-saving measures. Rather, boards should be allowed to retain these savings, as an incentive to continue looking for and investing in these measures.[4]

My basic approach to updating the benchmark costs, therefore, was to identify appropriate adjustments and apply those adjustments to the Ministry of Education's projected funding allocations for the current (2002–03) school year.

Appendix I contains a table, Table I.1, showing updates to individual grants and grant components and proposed new investments. Appendix J contains four tables. Tables J.1 and J.2 show the estimated cost of updates by individual benchmark (Table J.1 is a summary; Table J.2 offers more detail). Tables J.3 and J.4 respectively provide detailed calculations for the update to the Transportation Grant and the update to the School Operations Allocation of the Pupil Accommodation Grant.

All updated costs are for the school year September 1, 2001, to August 31, 2002. The costs updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate the costs to August 2003.

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### Notes for Appendix H

1. See, for example, Hugh Mackenzie, *Cutting Classes: Elementary and Secondary Education Funding in Ontario 2002–3* (Ottawa: Canadian Centre for Policy Alternatives, 2002). Several of the submissions I received and presentations I heard included estimates of updating benchmark costs. I wish to mention in particular the input I received from Bob Boucher, Associate Director, Corporate Services, and Treasurer, Sudbury Catholic District School Board; Ron Trbovich, Superintendent of Education, Business Department, and Treasurer, Durham District School Board; and other members of school business officials associations.

2. Defining "costs" also presents a problem. In reviewing boards' costs, questions arise about whether a certain cost meets the ministry's basic standards or whether it goes beyond them, and, if it goes beyond them, whether it does so to address specific needs acknowledged by the ministry or to address local priorities that may not be seen by the ministry as needs. This is an issue that will have to be addressed by the ministry, school boards, and other members of the education community when they develop their own approach to updating the benchmarks.

3. The increases since 1998 and prior to 2002–03 are as follows:
   - The benchmark costs for salaries, with the exception of those for school operations staff, were increased by 1.95 per cent in 2000–2001. I factored this increase into my updates.
   - The Transportation Grant received a $23-million increase in "one-time funding" in 2000–2001. That increase was made again as a one-time grant for 2001–02 and then added to the grant as an ongoing increase in 2002–03, pending the outcome of a review of the grant. I factored this increase into my updates.
   - The Local Priorities Amount (part of the Foundation Grant) was introduced in 2001–02 at $100 per pupil. In 2002–03, it was increased to $200 per pupil. My recommendation 17, on the Local Priorities Amount, is not related to updating benchmark costs.

   In 2002–03, the ministry made the following changes to the funding formula. These changes did not affect my updates of benchmark costs, although I have made recommendations related to all three of the allocations mentioned below.
   - It added $25 million to the School Renewal Allocation of the Pupil Accommodation Grant.
   - It added $20 million to the Transportation Grant.
   - It introduced the Declining Enrolment Allocation.

4. I discuss consortia and other cost-saving measures implemented by boards in Chapter 4, under "Student Transportation."

# Appendix I: Estimated Cost of Updating Benchmarks and Proposed New Investments – by Grant

### Table I.1: Estimated Cost of Updating Benchmarks and Proposed New Investments – by Grant

*Note:* Calculations may not be exact because numbers have been rounded.

| Grants and Grant Components | Ministry of Education Projected Funding Allocations for the Current Year (2002–03)[1] (Millions) | Benchmark Cost Update to August 31, 2002[2] (Recommendation 1) (Millions) | Proposed New Investments (Millions) | Recommendation Numbers for Proposed New Investments |
|---|---|---|---|---|
| **Foundation Grant** | | | | |
| Basic | $7,479 | **$477** | | |
| Local Priorities | $401 | | | |
| **Special Education** | $1,374 | **$88** | $250 | **23 & 24**<br>**($130M of $250M of Intensive Support Amount funding to be allocated in 2002–03)** |
| Special Education Per Pupil Amount (secondary panel) | | | $19 | **26** |
| **Language** | $423 | **$25** | $65 | **10** |
| **Geographic Circumstances** | | | | |
| Small Schools | $70 | **$4** | $50 | **15** |
| Principals | | **$1** | | |
| Remote and Rural | $118 | **$8** | | |
| **Learning Opportunities** | $293 | **$19** | $50 | **6** |
| **Continuing Education** | $141 | **$8** | | |
| **Teacher Qualifications and Experience** | $558 | **$30** | | |
| **Early Learning** | $10 | **$1** | | |
| **Transportation** | $611 | **$80[3]** | | **29**<br>**($20M to be allocated in 2002–03)** |
| **Declining Enrolment** | $17 | | $5 | **16** |
| **School Board Administration and Governance** | $456 | **$40** | | |

# Appendix I: Estimated Cost of Updating Benchmarks and Proposed New Investments – by Grant

### Table I.1: Estimated Cost of Updating Benchmarks and Proposed New Investments – by Grant

*Note:* Calculations may not be exact because numbers have been rounded.

| Grants and Grant Components | Ministry of Education Projected Funding Allocations for the Current Year (2002–03)[1] (Millions) | Benchmark Cost Update to August 31, 2002[2] (Recommendation 1) (Millions) | Proposed New Investments (Millions) | Recommendation Numbers for Proposed New Investments |
|---|---|---|---|---|
| **Foundation Grant** | | | | |
| Basic | $7,479 | $477 | | |
| Local Priorities | $401 | | | |
| **Special Education** | $1,374 | $88 | $250 | 23 & 24<br>($130M of $250M of Intensive Support Amount funding to be allocated in 2002–03) |
| Special Education Per Pupil Amount (secondary panel) | | | $19 | 26 |
| **Language** | $423 | $25 | $65 | 10 |
| **Geographic Circumstances** | | | | |
| Small Schools | $70 | $4 | $50 | 15 |
| Principals | | $1 | | |
| Remote and Rural | $118 | $8 | | |
| **Learning Opportunities** | $293 | $19 | $50 | 6 |
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| **Early Learning** | $10 | $1 | | |
| **Transportation** | $611 | $80[3] | | 29<br>($20M to be allocated in 2002–03) |
| **Declining Enrolment** | $17 | | $5 | 16 |
| **School Board Administration and Governance** | $456 | $40 | | |

| Grants and Grant Components | Ministry of Education Projected Funding Allocations for the Current Year (2002–03)[1] (Millions) | Benchmark Cost Update to August 31, 2002[2] (Recommendation 1) (Millions) | Proposed New Investments (Millions) | Recommendation Numbers for Proposed New Investments |
|---|---|---|---|---|
| **Pupil Accommodation** | | | | |
| School Operations | $1,396 | **$165** | | |
| School Renewal | $241 | **$25** | $50 | 19 |
| Deferred Maintenance | | | $200 | 20 |
| New Pupil Places | $363 | **$39** | | |
| Prior Commitments | $307 | | | |
| **OMERS Recovery[4]** | $(80) | | | |
| **School Authorities[5]** | $38 | | | |
| | **$14,215[1]** | **$1,010[2]** | **$689** | |

**Notes:**

1. Source: Ontario, Ministry of Education, "Student Focused Funding: School Board Funding Projections for the 2002–03 School Year" (2002), <http://www.edu.gov.on.ca/eng/funding/e0203projection.pdf>, 5, "Provincial Total" table, last column "2002–03 Projections." *All figures have been rounded.* Following publication of this document, the 2002 Provincial Budget added $45 million to the allocations ($20 million for Transportation and $25 million for School Renewal), for a revised total of $14,260 million.
2. See Appendix H for the approach used to update the benchmark costs. Updates to August 2003, *not including* teaching and support staff salary and benefits, would require an additional estimated $70 million based on a projected annual increase of 2% in the Ontario Consumer Price Index.
3. The benchmark cost update of $80 million excludes $23 million in adjustments to the Transportation Grant made in 2001–02. See Appendix J, Table J.2.
4. The Ontario Municipal Employees Retirement System (OMERS) is in surplus; therefore, school boards are not required to make full pension contributions for staff who are members of OMERS. Since the benchmark cost for benefits is based on the assumption that boards are making the full contribution, the ministry deducts the savings from the boards' allocations.
5. School authorities are funded outside the grant structure. A school authority usually operates a single school in a very isolated area, or a school in a children's treatment centre or hospital.

# Appendix J: Estimated Cost of Updating Benchmarks – by Benchmark

This appendix contains four tables, as follows:

- "Table J.1: Summary of Estimated Cost of Updating Benchmarks – by Benchmark" provides a summary of the total cost of updating each benchmark category.
- "Table J.2: Estimated Cost of Updating Benchmarks – by Benchmark" provides more detailed information than Table J.1. Following Table J.2 are notes that offer additional information about the calculations.
- "Table J.3: Details of the Calculations Used to Update Transportation Costs"
- "Table J.4: Details of the Calculations Used to Update the School Operations Benchmarks"

The base year for the updates is 1998, the year the current funding formula came into effect, except where the Ministry of Education has added funding since 1998 and prior to 2002–03. The 1998 base costs were derived from actual school board costs in 1997.

**Table J.1: Summary of Estimated Cost of Updating Benchmarks – by Benchmark**

| Benchmark | Total Cost (Millions) |
|---|---|
| **Teachers' salaries** | **$366** |
| Non-teachers' salaries | $93 |
| **School operations staff salaries** | **$45** |
| Benefits | $170 |
| **Learning materials** | **$22** |
| Classroom supplies | $28 |
| **Classroom computers** | **$14** |
| In-school administration (supplies) | $2 |
| **Board-level administration (supplies)** | **$15** |
| School operations non-salary costs | $111 |
| **Transportation** | **$80** |
| School renewal | $25 |
| **New pupil places** | **$39** |
| **Total** | **$1,010** |

| Grants and Grant Components | Ministry of Education Projected Funding Allocations for the Current Year (2002–03)[1] (Millions) | Benchmark Cost Update to August 31, 2002[2] (Recommendation 1) (Millions) | Proposed New Investments (Millions) | Recommendation Numbers for Proposed New Investments |
|---|---|---|---|---|
| **Pupil Accommodation** | | | | |
| School Operations | $1,396 | **$165** | | |
| School Renewal | $241 | **$25** | $50 | 19 |
| Deferred Maintenance | | | $200 | 20 |
| New Pupil Places | $363 | **$39** | | |
| Prior Commitments | $307 | | | |
| **OMERS Recovery[4]** | $(80) | | | |
| **School Authorities[5]** | $38 | | | |
| | **$14,215[1]** | **$1,010[2]** | **$689** | |

**Notes:**

1. Source: Ontario, Ministry of Education, "Student Focused Funding: School Board Funding Projections for the 2002–03 School Year" (2002), <http://www.edu.gov.on.ca/eng/funding/e0203projection.pdf>, 5, "Provincial Total" table, last column "2002–03 Projections." *All figures have been rounded.* Following publication of this document, the 2002 Provincial Budget added $45 million to the allocations ($20 million for Transportation and $25 million for School Renewal), for a revised total of $14,260 million.
2. See Appendix H for the approach used to update the benchmark costs. Updates to August 2003, *not including* teaching and support staff salary and benefits, would require an additional estimated $70 million based on a projected annual increase of 2% in the Ontario Consumer Price Index.
3. The benchmark cost update of $80 million excludes $23 million in adjustments to the Transportation Grant made in 2001–02. See Appendix J, Table J.2.
4. The Ontario Municipal Employees Retirement System (OMERS) is in surplus; therefore, school boards are not required to make full pension contributions for staff who are members of OMERS. Since the benchmark cost for benefits is based on the assumption that boards are making the full contribution, the ministry deducts the savings from the boards' allocations.
5. School authorities are funded outside the grant structure. A school authority usually operates a single school in a very isolated area, or a school in a children's treatment centre or hospital.

# Appendix J: Estimated Cost of Updating Benchmarks – by Benchmark

This appendix contains four tables, as follows:

- "Table J.1: Summary of Estimated Cost of Updating Benchmarks – by Benchmark" provides a summary of the total cost of updating each benchmark category.
- "Table J.2: Estimated Cost of Updating Benchmarks – by Benchmark" provides more detailed information than Table J.1. Following Table J.2 are notes that offer additional information about the calculations.
- "Table J.3: Details of the Calculations Used to Update Transportation Costs"
- "Table J.4: Details of the Calculations Used to Update the School Operations Benchmarks"

The base year for the updates is 1998, the year the current funding formula came into effect, except where the Ministry of Education has added funding since 1998 and prior to 2002–03. The 1998 base costs were derived from actual school board costs in 1997.

**Table J.1: Summary of Estimated Cost of Updating Benchmarks – by Benchmark**

| Benchmark | Total Cost (Millions) |
|---|---|
| Teachers' salaries | $366 |
| Non-teachers' salaries | $93 |
| School operations staff salaries | $45 |
| Benefits | $170 |
| Learning materials | $22 |
| Classroom supplies | $28 |
| Classroom computers | $14 |
| In-school administration (supplies) | $2 |
| Board-level administration (supplies) | $15 |
| School operations non-salary costs | $111 |
| Transportation | $80 |
| School renewal | $25 |
| New pupil places | $39 |
| **Total** | **$1,010** |

**Table J.2: Estimated Cost of Updating Benchmarks – by Benchmark**

*Note:* Some calculations may not be exact because some numbers have been rounded.

| Benchmark | Current Benchmark Cost | Updated Cost (to August 31, 2002) | Change | Total Cost (to August 31, 2002) | Notes (Additional notes follow this table.) |
|---|---|---|---|---|---|
| **Projected average teachers' salaries** | $50,975 | $53,320 | 4.6% | $366M | – Based on an analysis of negotiated settlements<br>– Using the funding formula's instructional salary matrix, the average salary would increase from $55,059 to $57,591. |
| **Non-teachers' salaries:** | | | 4.6% | $93M | – Assumes same increase as for teachers' salary benchmarks<br>– Excludes school operations staff (see below) |
| Elementary | | | | | |
| – Principals | $79,296 | $82,944 | | | |
| – Vice-principals | $72,360 | $75,689 | | | |
| – Teaching assistants | $22,590 | $23,629 | | | |
| – Professionals | $43,686 | $45,696 | | | |
| – Secretaries | $28,346 | $29,650 | | | |
| – Classroom consultants | $70,171 | $73,399 | | | |
| Secondary | | | | | |
| – Principals | $86,479 | $90,457 | | | |
| – Vice-principals | $76,337 | $79,849 | | | |
| – Department heads | $3,262 | $3,412 | | | |
| – Professionals | $43,686 | $43,696 | | | |
| – Secretaries | $29,859 | $31,233 | | | |
| – Classroom consultants | $70,171 | $73,399 | | | |
| **School operations staff costs (based on cost per sq. ft.)** | | | | | – 1.95% + 4.6% = 6.6%<br>The 1.95% covers the increase given to all other staff in 2000–01. The 4.6% is an assumption of the same increase as was applied to teachers' salary benchmarks. |
| – Salaries | $2.97 | $3.17 | 6.6% | $45M | |
| – Non-salary costs | $2.23 | $2.64 | | | |
| – Total costs | $5.20 | $5.81 | | | |
| **Benefits** | | | | | – Includes $9M for school operations staff benefits |
| – Teachers | 12% | 13.1% | 9.2% | $85M | |
| – Non-teaching staff | 15.7% | 19.2% | 22.3% | $85M | |
| | | | | $170M | |
| **Textbooks and learning materials** | | | | | – Based on increases in Ontario CPI |
| – Elementary | $75 | $83 | 10.3% | $14M | |
| – Secondary | $100 | $110 | 10.3% | $8M | |
| | | | | $22M | |
| **Classroom supplies** | | | | | – Based on increases in Ontario CPI |
| – Elementary | $77 | $85 | 10.3% | $14M | |
| – Secondary | $173 | $191 | 10.3% | $14M | |
| | | | | $28M | |
| **Classroom computers** | | | | | – Based on increases in Ontario CPI |
| – Elementary | $43 | $47 | 10.3% | $9M | |
| – Secondary | $56 | $62 | 10.3% | $5M | |
| | | | | $14M | |
| **In-school administration (supplies)** | $5 | $6 | 10.3% | $2M | – Based on increases in Ontario CPI |

| Benchmark | Current Benchmark Cost | Updated Cost (to August 31, 2002) | Change | Total Cost (to August 31, 2002) | Notes (Additional notes follow this table.) |
|---|---|---|---|---|---|
| **Board administration (supplies)** | $67 | **$74** | 10.3% | **$15M** | – Based on increases in Ontario CPI |
| **School operations non-salary costs (based on cost per sq. ft.)** | | | | | – $54M for the salary and benefits components of school operations is accounted for above in the "School operations staff costs" and "Benefits" sections |
| – Salary components | $2.97 | **$3.17** | 6.6% | | |
| – Utility components | $1.01 | **$1.30** | 28.8% | **$79M** | |
| – Other components | $1.22 | **$1.34** | 10.3% | **$32M** | |
| – Total costs | $5.20 | **$5.81** | 11.7% | **$111M** | |
| **Transportation**<br>– Base funding for this calculation is the 2001–02 total of $581M plus $6M for the transportation component of the Declining Enrolment Allocation | $587M | | 17.5% | **$80M**<br>**($103M minus the $23M already provided. See note 3 at the end of Appendix H.)** | – See Table J.3. |
| **School renewal** | | | | | – Based on increases in Ontario CPI |
| – Elementary | $64M | **$71M** | 10.3% | **$25M** | |
| – Secondary | $83M | **$92M** | 10.3% | | |
| **New pupil places** | | | | | – Based on increases in Ontario CPI<br>– The updated costs do not differentiate between "old" and "new" construction costs. See note 7, below. |
| – Elementary | $117M | **$129M** | 10.3% | **$39M** | |
| – Secondary | $126M | **$139M** | 10.3% | | |

**Notes:**

1. **Teachers' salaries:** I used the 2001–02 negotiated salary grids and data on the distribution of teachers by board to determine the "actual" current (2001–02) salary costs for teachers (the figure is based on contracts representing over 90% of teachers), and then compared that amount to the amount generated by the existing salary benchmarks. The difference was 4.6%. I applied this percentage to obtain my estimate of the cost of updating the teachers' salary benchmark cost.

2. **Non-teachers' salaries:** This category includes principals, vice-principals, secretaries, professional and para-professional support staff, directors of education, and board administrative staff. It excludes school operations staff. (See note 6, "School operations," below.) I used the 4.6% increase calculated for teachers' salaries to estimate the required adjustment.

3. **Benefits:** My estimated increases in statutory and non-statutory benefits are based on a review of actual benefit expenditures. The benchmark rate was adjusted from 12% to 13.1% of teachers' salaries and from a weighted average of 15.7% to a weighted average of 19.2% of non-teachers' salaries. I then applied those factors to the increased salary benchmark costs for teaching and non-teaching staff (see notes 1 and 2 above) and to the salary benchmark cost component of School Operations.

4. **All other "learning" costs (textbooks, classroom supplies, classroom computers), in-school administration costs, and board-level non-salary costs:** These items were increased by the percentage change in the Ontario Consumer Price Index (CPI) for the period 1997–2002.

5. **Transportation:** To develop the cost adjustment factor for transportation, I used a model that identifies the major expenses by category and the total cost of operating a 72-passenger bus for a school year. I then determined the cost increases on the basis of price changes derived from bus contracts and available price indexes. In determining these increases, I took into account the $23 million increase the ministry made to the grant in 2001–02. Details of the cost update for transportation are presented in Table J.3.

6. **School operations:** The School Operations Allocation includes the costs of school operations staff, contracted services, insurance, maintenance supplies and equipment, and utilities.

   Since the salary benchmark costs of school operations staff were not increased by 1.95% in 2000–2001 when other salary benchmark costs were increased, I applied that 1.95% increase and then added the 4.6% adjustment I had calculated for teachers' salary benchmark costs (see note 1 above) for a total increase of 6.6%. I used the 6.6% to calculate the update for the salary benchmark costs of school operations staff.

### Table J.2: Estimated Cost of Updating Benchmarks – by Benchmark

*Note:* Some calculations may not be exact because some numbers have been rounded.

| Benchmark | Current Benchmark Cost | Updated Cost (to August 31, 2002) | Change | Total Cost (to August 31, 2002) | Notes (Additional notes follow this table.) |
|---|---|---|---|---|---|
| **Projected average teachers' salaries** | $50,975 | $53,320 | 4.6% | $366M | – Based on an analysis of negotiated settlements<br>– Using the funding formula's instructional salary matrix, the average salary would increase from $55,059 to $57,591. |
| **Non-teachers' salaries:** | | | 4.6% | $93M | – Assumes same increase as for teachers' salary benchmarks<br>– Excludes school operations staff (see below) |
| Elementary | | | | | |
| – Principals | $79,296 | $82,944 | | | |
| – Vice-principals | $72,360 | $75,689 | | | |
| – Teaching assistants | $22,590 | $23,629 | | | |
| – Professionals | $43,686 | $45,696 | | | |
| – Secretaries | $28,346 | $29,650 | | | |
| – Classroom consultants | $70,171 | $73,399 | | | |
| Secondary | | | | | |
| – Principals | $86,479 | $90,457 | | | |
| – Vice-principals | $76,337 | $79,849 | | | |
| – Department heads | $3,262 | $3,412 | | | |
| – Professionals | $43,686 | $43,696 | | | |
| – Secretaries | $29,859 | $31,233 | | | |
| – Classroom consultants | $70,171 | $73,399 | | | |
| **School operations staff costs (based on cost per sq. ft.)** | | | | | – 1.95% + 4.6% = 6.6%<br>The 1.95% covers the increase given to all other staff in 2000–01. The 4.6% is an assumption of the same increase as was applied to teachers' salary benchmarks. |
| – Salaries | $2.97 | $3.17 | 6.6% | $45M | |
| – Non-salary costs | $2.23 | $2.64 | | | |
| – Total costs | $5.20 | $5.81 | | | |
| **Benefits** | | | | | – Includes $9M for school operations staff benefits |
| – Teachers | 12% | 13.1% | 9.2% | $85M | |
| – Non-teaching staff | 15.7% | 19.2% | 22.3% | $85M | |
| | | | | $170M | |
| **Textbooks and learning materials** | | | | | – Based on increases in Ontario CPI |
| – Elementary | $75 | $83 | 10.3% | $14M | |
| – Secondary | $100 | $110 | 10.3% | $8M | |
| | | | | $22M | |
| **Classroom supplies** | | | | | – Based on increases in Ontario CPI |
| – Elementary | $77 | $85 | 10.3% | $14M | |
| – Secondary | $173 | $191 | 10.3% | $14M | |
| | | | | $28M | |
| **Classroom computers** | | | | | – Based on increases in Ontario CPI |
| – Elementary | $43 | $47 | 10.3% | $9M | |
| – Secondary | $56 | $62 | 10.3% | $5M | |
| | | | | $14M | |
| **In-school administration (supplies)** | $5 | $6 | 10.3% | $2M | – Based on increases in Ontario CPI |

| Benchmark | Current Benchmark Cost | Updated Cost (to August 31, 2002) | Change | Total Cost (to August 31, 2002) | Notes (Additional notes follow this table.) |
|---|---|---|---|---|---|
| **Board administration (supplies)** | $67 | **$74** | 10.3% | **$15M** | – Based on increases in Ontario CPI |
| **School operations non-salary costs (based on cost per sq. ft.)** | | | | | – $54M for the salary and benefits components of school operations is accounted for above in the "School operations staff costs" and "Benefits" sections |
| – Salary components | $2.97 | **$3.17** | 6.6% | | |
| – Utility components | $1.01 | **$1.30** | 28.8% | **$79M** | |
| – Other components | $1.22 | **$1.34** | 10.3% | **$32M** | |
| – Total costs | $5.20 | **$5.81** | 11.7% | **$111M** | |
| **Transportation**<br>– Base funding for this calculation is the 2001–02 total of $581M plus $6M for the transportation component of the Declining Enrolment Allocation | $587M | | 17.5% | **$80M**<br>**($103M minus the $23M already provided. See note 3 at the end of Appendix H.)** | – See Table J.3. |
| **School renewal** | | | | | – Based on increases in Ontario CPI |
| – Elementary | $64M | **$71M** | 10.3% | **$25M** | |
| – Secondary | $83M | **$92M** | 10.3% | | |
| **New pupil places** | | | | | – Based on increases in Ontario CPI<br>– The updated costs do not differentiate between "old" and "new" construction costs. See note 7, below. |
| – Elementary | $117M | **$129M** | 10.3% | **$39M** | |
| – Secondary | $126M | **$139M** | 10.3% | | |

**Notes:**

1. **Teachers' salaries:** I used the 2001–02 negotiated salary grids and data on the distribution of teachers by board to determine the "actual" current (2001–02) salary costs for teachers (the figure is based on contracts representing over 90% of teachers), and then compared that amount to the amount generated by the existing salary benchmarks. The difference was 4.6%. I applied this percentage to obtain my estimate of the cost of updating the teachers' salary benchmark cost.

2. **Non-teachers' salaries:** This category includes principals, vice-principals, secretaries, professional and para-professional support staff, directors of education, and board administrative staff. It excludes school operations staff. (See note 6, "School operations," below.) I used the 4.6% increase calculated for teachers' salaries to estimate the required adjustment.

3. **Benefits:** My estimated increases in statutory and non-statutory benefits are based on a review of actual benefit expenditures. The benchmark rate was adjusted from 12% to 13.1% of teachers' salaries and from a weighted average of 15.7% to a weighted average of 19.2% of non-teachers' salaries. I then applied those factors to the increased salary benchmark costs for teaching and non-teaching staff (see notes 1 and 2 above) and to the salary benchmark cost component of School Operations.

4. **All other "learning" costs (textbooks, classroom supplies, classroom computers), in-school administration costs, and board-level non-salary costs:** These items were increased by the percentage change in the Ontario Consumer Price Index (CPI) for the period 1997–2002.

5. **Transportation:** To develop the cost adjustment factor for transportation, I used a model that identifies the major expenses by category and the total cost of operating a 72-passenger bus for a school year. I then determined the cost increases on the basis of price changes derived from bus contracts and available price indexes. In determining these increases, I took into account the $23 million increase the ministry made to the grant in 2001–02. Details of the cost update for transportation are presented in Table J.3.

6. **School operations:** The School Operations Allocation includes the costs of school operations staff, contracted services, insurance, maintenance supplies and equipment, and utilities.

   Since the salary benchmark costs of school operations staff were not increased by 1.95% in 2000–2001 when other salary benchmark costs were increased, I applied that 1.95% increase and then added the 4.6% adjustment I had calculated for teachers' salary benchmark costs (see note 1 above) for a total increase of 6.6%. I used the 6.6% to calculate the update for the salary benchmark costs of school operations staff.

I updated utility benchmark costs on the basis of increases in the Ontario CPI since 1997 in the costs of water, fuel, and electricity. All other school operations benchmark costs were also updated on the basis of changes in the Ontario CPI since 1997.

7. **School renewal and new pupil places:** My update of benchmarks costs for the School Renewal and New Pupil Places Allocations of the Pupil Accommodation Grant is based on changes in the Ontario CPI. I considered using the Non-Residential Construction Price Index, but since it applies to only Ottawa and Toronto and is only available on a quarterly basis, I decided to use the Ontario CPI as a "proxy."

   If my recommendation 3 is implemented and the funding formula is reviewed on a regular basis, the Ministry of Education and education stakeholders will want to determine an appropriate methodology and index for updating the benchmarks in the School Renewal Allocation of the Pupil Accommodation Grant. They will also want to consider the effect of the ministry's initiative to assess school renewal needs, described in Chapter 4 under "School Renewal," on the School Renewal Allocation's benchmark costs.

   Updating the benchmark costs in the New Pupil Places Allocation will prove more complex. As I explained in Chapter 4, since 1998 funds have been provided under this allocation for both "old" construction – construction that is well under way or completed – and for "new" construction – construction that has not yet begun. My calculation of the cost of updating the benchmark costs in the New Pupil Places Allocation, which is set out in Table J.2, does not differentiate between funding for "old" and "new" construction costs because of the difficulty involved in separating these two costs in the current funding allocation. In recommendation 21, I recommend that "the Ministry of Education review the benchmark costs in the New Pupil Places Allocation with a view to distinguishing between benchmark costs for construction that is under way or has been completed and benchmark costs for construction that is projected, and that it update and review, as described in recommendations 1 and 3, only the benchmark costs for construction that is projected."

### Table J.3: Details of the Calculations Used to Update Transportation Costs

| Component | Share of Expenditures | Change (from 1997 to 2001–02) | Description |
|---|---|---|---|
| **New bus costs** | 26.8% | 32% | – Cost of a 72-passenger bus in 1997 and 2002 |
| **Licensing, inspections, and insurance** | 5.2% | 50% | – Reflects increase in insurance and inspection costs |
| **Fuel** | 9.6% | 9.6% | – Ontario, unit cost price for diesel fuel (Ministry of Environment and Energy) |
| **Drivers** | 27.4% | | – Wages: 1.95% + 4.6% = 6.6%<br>The 1.95% covers the increase given to most staff in 2000–2001. The 4.6% is an assumption of the same increase as was applied to teachers' salary benchmarks. |
| – Wages | | 6.6% | |
| – Benefits | | 3.5% | – Benefits: Increase is the same as that applied to non-teachers benefits. |
| **Vehicle maintenance** | 18.5% | 11.7% | – Based on increases in Ontario CPI component "Automotive vehicle parts, maintenance, and repairs" |
| **Other components**<br>– Buildings, etc. | 12.5% | 10.3% | – Based on increases in Ontario CPI |
| **Total** | 100% | 17.5% | |

## Table J.4: Details of the Calculations Used to Update the School Operations Benchmarks

| Component | Share of Expenditures | Change (from 1997 to 2001-02) | Description |
|---|---|---|---|
| **Salaries and benefits** | | | – Wages: 1.95% + 4.6% = 6.6%<br>The 1.95% covers the increase given to most staff in 2000–2001. The 4.6% is an assumption of the same increase as was applied to teachers' salary benchmarks.<br>– Benefits: Increase is the same as that applied to non-teachers benefits. |
| – Salaries | 57% | **6.6%** | |
| – Benefits | | **22.3%** | |
| **Utilities** | | | |
| – Gas | 20% | **28.8%** | – Based on increases in Ontario CPI component "Water, fuel, and electricity" |
| – Electricity | | | |
| – Sewage and water | | | |
| **Other costs** | 23% | **10.3%** | – Based on increases in Ontario CPI |
| – Supplies and equipment | | | |
| – Contract services | | | |
| – Insurance | | | |
| **Total** | **100%** | **11.7%** | |

I updated utility benchmark costs on the basis of increases in the Ontario CPI since 1997 in the costs of water, fuel, and electricity. All other school operations benchmark costs were also updated on the basis of changes in the Ontario CPI since 1997.

7. **School renewal and new pupil places:** My update of benchmarks costs for the School Renewal and New Pupil Places Allocations of the Pupil Accommodation Grant is based on changes in the Ontario CPI. I considered using the Non-Residential Construction Price Index, but since it applies to only Ottawa and Toronto and is only available on a quarterly basis, I decided to use the Ontario CPI as a "proxy."

   If my recommendation 3 is implemented and the funding formula is reviewed on a regular basis, the Ministry of Education and education stakeholders will want to determine an appropriate methodology and index for updating the benchmarks in the School Renewal Allocation of the Pupil Accommodation Grant. They will also want to consider the effect of the ministry's initiative to assess school renewal needs, described in Chapter 4 under "School Renewal," on the School Renewal Allocation's benchmark costs.

   Updating the benchmark costs in the New Pupil Places Allocation will prove more complex. As I explained in Chapter 4, since 1998 funds have been provided under this allocation for both "old" construction – construction that is well under way or completed – and for "new" construction – construction that has not yet begun. My calculation of the cost of updating the benchmark costs in the New Pupil Places Allocation, which is set out in Table J.2, does not differentiate between funding for "old" and "new" construction costs because of the difficulty involved in separating these two costs in the current funding allocation. In recommendation 21, I recommend that "the Ministry of Education review the benchmark costs in the New Pupil Places Allocation with a view to distinguishing between benchmark costs for construction that is under way or has been completed and benchmark costs for construction that is projected, and that it update and review, as described in recommendations 1 and 3, only the benchmark costs for construction that is projected."

**Table J.3: Details of the Calculations Used to Update Transportation Costs**

| Component | Share of Expenditures | Change (from 1997 to 2001–02) | Description |
|---|---|---|---|
| **New bus costs** | 26.8% | 32% | – Cost of a 72-passenger bus in 1997 and 2002 |
| **Licensing, inspections, and insurance** | 5.2% | 50% | – Reflects increase in insurance and inspection costs |
| **Fuel** | 9.6% | 9.6% | – Ontario, unit cost price for diesel fuel (Ministry of Environment and Energy) |
| **Drivers**<br>– Wages<br>– Benefits | 27.4% | <br>6.6%<br>3.5% | – Wages: 1.95% + 4.6% = 6.6% The 1.95% covers the increase given to most staff in 2000–2001. The 4.6% is an assumption of the same increase as was applied to teachers' salary benchmarks.<br>– Benefits: Increase is the same as that applied to non-teachers benefits. |
| **Vehicle maintenance** | 18.5% | 11.7% | – Based on increases in Ontario CPI component "Automotive vehicle parts, maintenance, and repairs" |
| **Other components**<br>– Buildings, etc. | 12.5% | 10.3% | – Based on increases in Ontario CPI |
| **Total** | 100% | 17.5% | |

## Table J.4: Details of the Calculations Used to Update the School Operations Benchmarks

| Component | Share of Expenditures | Change (from 1997 to 2001-02) | Description |
|---|---|---|---|
| **Salaries and benefits**<br>– Salaries<br>– Benefits | 57% | 6.6%<br>22.3% | – Wages: 1.95% + 4.6% = 6.6%<br>The 1.95% covers the increase given to most staff in 2000–2001. The 4.6% is an assumption of the same increase as was applied to teachers' salary benchmarks.<br>– Benefits: Increase is the same as that applied to non-teachers benefits. |
| **Utilities**<br>– Gas<br>– Electricity<br>– Sewage and water | 20% | 28.8% | – Based on increases in Ontario CPI component "Water, fuel, and electricity" |
| **Other costs**<br>– Supplies and equipment<br>– Contract services<br>– Insurance | 23% | 10.3% | – Based on increases in Ontario CPI |
| **Total** | 100% | 11.7% | |

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*Note:* The universal resource locators (URLs) for electronic texts that are cited below were accessed during the course of the task force's research, between May and November 2002. Some or all of these electronic texts may be inaccessible after publication of this report, or they may no longer be available at the URLs shown. The task force takes no responsibility for their accessibility.

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